

TRAINING PACKAGE # 2

Gender Friendly Organizational Development

MODULE # 3

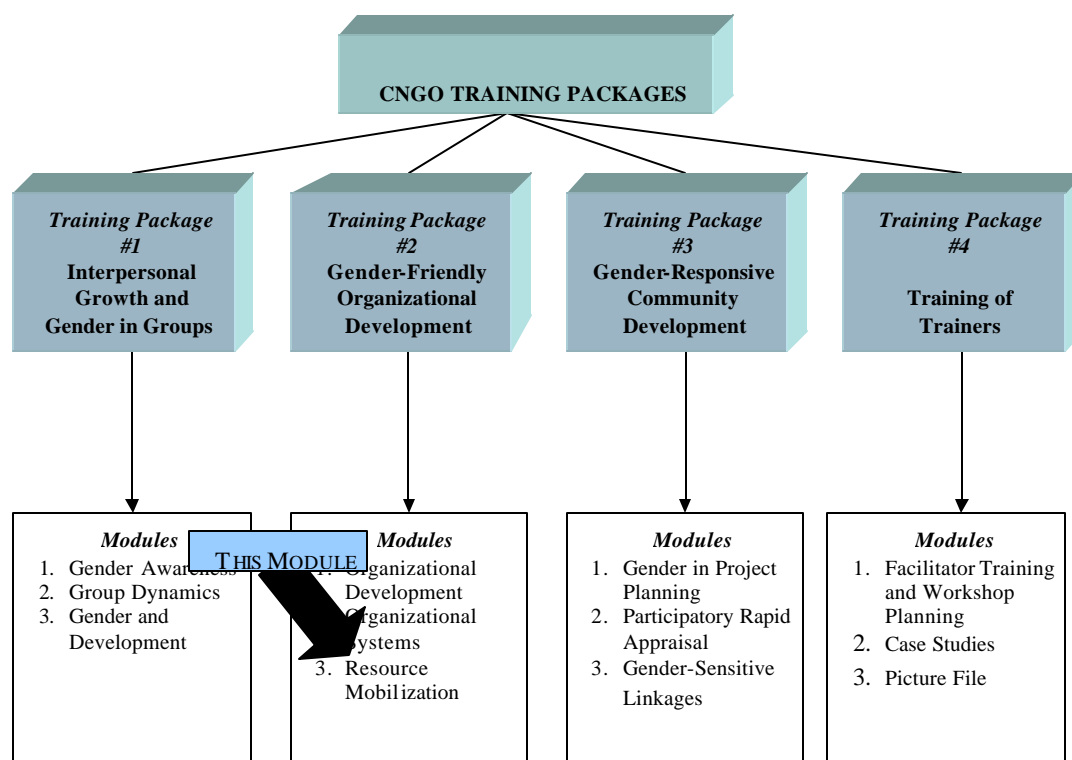
Resource Mobilization



Canada Nepal Gender in Organizations Project
with the support of the Canadian International Development Agency

About the Resource Mobilization Module

This module is part of a series of training packages that was produced by the CIDA-funded Canada-Nepal Gender in Organizations Project. The series consists of four packages, each with several modules.



Each module is divided into three sections:

Section 1: **Background Information** defines some key concepts and provides information on the topic.

Section 2: **Participatory Activities** describes step-by-step activities. The facilitator should look to these for ideas, but should be selective and develop additional activities to fit specific circumstances.

Section 3: **Reference Materials** provides background reading, tools, examples and worksheets relevant to the topic and the activities.

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SECTION 1: BACKGROUND INFORMATION

Introduction

Organizational resources include money, human beings, equipment and materials that an organization draws upon to meet its needs. The ways in which an organization acquires the resources it needs and the sources of those resources determine what the organization is and what it can be. To survive, an organization must understand the importance of mobilizing resources, particularly local resources. The

process of resource mobilization can help sensitize the organization to the local community, and can lead to insight and inspiration. Mobilizing resources can reinforce and strengthen an organization and lead it toward sustainability.

This resource mobilization module explains the concepts, knowledge, and skills of resource mobilization for organizational sustainability.

Key Concepts

Resources: Resources are the financial and non-financial supplies that help to fulfill organizational needs. They include money, the skills, time contributions and services of humans, and equipment and materials.

Resource Mobilization : Resource mobilization is the process of identifying and obtaining resources for the organization. NGOs need both financial and non-financial resources

Resource mobilization strategic options: Organizations have to make decisions about where to invest their energies to mobilize resources. They must decide when to focus on non-financial resources and when to seek financial resources. When seeking financial resources, they must consider whether to generate funds themselves, or whether to seek funds from other organizations. There are six questions that an NGO should take into account when deciding how to mobilize resources. These are:

Vulnerability: Does this strategy make us dependent on others, thus increasing our vulnerability to external events and outside organizations. For example, an NGO that gets all its financing from a particular donor is dependent on that donor, or vulnerable to external decisions and pressures. The less vulnerable an NGO is, the more likely it will sustain. Highly vulnerable NGOs are unable to cope.

Sensitivity: How sensitive is the organization to potential changes in the resource? For example,

an increase in the price of materials, or changes in personnel might affect the ability of an organization to complete a project. Low sensitivity means that external changes do not cause immediate severe disruption, high sensitivity means that they do.

Criticality: How critical is the resource to the operation of the NGO or the specific activity? Can the resource be easily replaced by another resource? For example, it might be difficult for an organization to replace a core technical person. Resources that cannot be easily replaced are “highly critical.”

Consistency: Can the mix of resources be adapted or changed without jeopardizing the organization or the specific activity? For example an organization might or might not be able to change the composition of human resources on a project implementation team. High consistency resources mean that an NGO can alter the resource profile without compromising itself.

Autonomy: Will the use of this resource affect the organization’s ability to make independent decisions, to negotiate terms and to say no when necessary? For example, a donor might provide funding but might specify the funds can only be used to purchase equipment that is manufactured in the donor country.

Compatibility: Is the new resource compatible with old resources? If the new resource is not compatible with the old, it might mean replacing the old resource, or modifying the organization

in some way. For example, a new piece of computer software might not be compatible with an old computer operating system.

Generally, resources that reflect low vulnerability, low sensitivity, low criticality, high consistency, substantial autonomy, and high compatibility are more desirable as they enable the NGO to be more agile and adaptive.

The first major strategic decision that NGOs must make in resource mobilization is whether, and to what degree, to focus on human resources, material resources or financial resources. Because NGOs are usually dependent on external funding, the mobilization of financial resources tends to dominate. But mobilizing volunteer and community resources is also a strategy that keeps an NGO close to its community-based roots.

In mobilizing financial resources, an organization faces two immediate decisions. One is for the organization to generate its own financial resources. This leaves the organization in greater control and the threat to autonomy is reduced. Having autonomy also means less vulnerability to outsiders, less sensitivity, and the ability to replace critical resources because the organization can decide where to put the surplus it produces.

One relatively unexplored area of resource mobilization is for non-governmental organizations to actively pursue non-financial resources. Non-monetary contributions such as volunteer work from community-based organizations and linkages with other organizations should be explored and fully utilized. Often these options receive little attention in resource mobilization because they do not increase the organization's income. However, they are important options that have many advantages and provide other positive benefits. In addition to reducing costs, non-financial resources can build networks, enhance information, create links to power holders, and enhance public awareness and organizational credibility.

The analysis of resources from a gender perspective is important to gain an understanding of how women and men gain access to resources, and how they mobilize them. For example, in Nepal most land is owned by men but usually worked by women. Also, women and men use time differently -- in Nepal women do the majority of unpaid work, especially around the home. Without recognizing the gender division in labour and unpaid work there is a discrepancy in how resource mobilization is viewed.

Objectives of Training Module

To enhance participants' understanding of resource mobilization for organizational sustainability.

To help participants develop strategies for mobilizing resources to meet the mission of their gender resource organizations.

To enhance the skills of participants to prepare gender responsive proposals as a tool for resource mobilization.

SECTION 2: PARTICIPATORY ACTIVITIES

Activity Set#1: Understanding Resources

This activity set is intended to introduce the concept of resources and provide participants with an understanding of the importance of resource mobilization for the development of their organization. Sub-activities include:

Sub-Activity #1.1	What are Resources?
Sub-Activity #1.2	Classification of Resources
Sub-Activity #1.3	Mobilizing Resources to Achieve Objectives
Sub-Activity #1.4	Resource Mobilization and Sustainability
Sub-Activity #1.5	Hut Ram's Economic Development Triangle

Sub-Activity #1.1: What are Resources?

OBJECTIVE

Participants will be able to identify and explain resources.

KEY QUESTION

What is meant by the term “resources”?

TIME

1 – 2 hours

METHODOLOGY

Brainstorming, questions and answers, group work and presentations

MATERIALS

Meta cards, newsprint, markers, masking tape, [Reference #1: Definition of Resources](#)

PREPARATION

Prepare signs or flip chart showing definitions of resources (To be displayed at step 6 below.)

STEPS

1. Divide participants into four groups and ask two groups to observe thoroughly the training room and ask the other two groups to go outside and observe the surroundings.
2. Discuss in their groups what they observed and let them present in the plenary.
3. Write down the responses of the participants on the board or newsprint.
4. Discuss the questions: How are the things that you observed related to managing an organization? How are they useful in managing an organization? Can these things be termed resources? How can resources contribute to an organization?
5. Ask each group to discuss their understanding and definition of resources. Present findings in plenary.
6. Post previously prepared signs or flip chart showing definitions of resources. Ask participants to match their definitions with these definitions. Discuss.

CLOSURE

Summarize the session by incorporating participants' views and emphasizing that although there are different types of resources, human resources are central to all other resources.

Restate the key question. Ask participants if the activity has enabled them to answer it. If necessary, clarify items.

Tips for Facilitators

The numbers of groups formed depends upon the number of participants.

Groups should be heterogeneous, i.e., mixed male and female, mixed position and mixed organization.

Facilitators should ensure that the definition of resources is made gender sensitive.

Encourage participants to come to the front of the group and summarize the points.

Sub-Activity #1.2: Classification of Resources

OBJECTIVE

Participants will be able to distinguish and categorize different types of resources.

KEY QUESTION

What are the different types of organizational resources? How can they be categorized?

TIME

1 –1 1/2 hours

METHODOLOGY

Individual reflection, experience sharing, game, small group discussion, and presentations.

MATERIALS

Meta cards, newsprint, markers, masking tape, mixed grains and stones, [Reference #2: Classification of Resources](#)

PREPARATION

Assemble materials. Prepare handout.

STEPS

Part A: Sorting Exercise

1. Start the exercise by forming two groups.
2. Give a package of mixed grains to one group and stones of different sizes and weights to the other group. Then ask each group to separate these items into categories (e.g., size, color, structure).
3. Discuss the questions: On what basis did the group separate the items and categorize them into groups? Were similar characteristics such as color, size or type considered before separating and categorizing these items?
4. Have each group present their findings in the plenary and summarize the purpose of the game and the views of participants.

Part B: Types of Organizational Resources

1. Indicate that just as we can sort and categorize things such as stones and grains, we can also sort and categorize the types of resources that are available to organizations. Brainstorm with participants the types of resources that exist. Ask how we can classify these resources.
2. Record responses on newsprint.
3. Provide a brief explanation of the types of resources (i.e., financial resources, non-financial resources, human resources, natural resources, internal resources, external resources, and local resources) that apply in operating an NGO.
4. If appropriate to the literacy level of participants, distribute handout [Reference #2: Classification of Resources](#)

CLOSURE

Restate the key questions. Ask participants if the activity has enabled them to answer these. If necessary, clarify items.

Tips for Facilitators

Relate the learning points of the game to the context of categories of organizational resources.

Give enough time for open discussion.

Sub-Activity #1.3: Mobilizing Resources to Achieve Objectives

OBJECTIVE

Participants will understand the importance of mobilizing resources.

KEY QUESTION

Why are resources important for attaining organizational objectives?

TIME

2 hours

METHODOLOGY

Introductory game, group work, poster creation, presentation and discussion in plenary.

MATERIALS

Newsprint, markers, masking tape, meta cards, prizes, game cards, [Reference #3: Importance of Resources Mobilization](#)

PREPARATION

On meta cards or index cards, write out the five sets of questions to be used by groups in Part B.

On newsprint, write points from [Reference #3: Importance of Resources Mobilization](#), or prepare as a handout.

Decide on prize. Assemble materials.

STEPS***Part A: Game***

1. Form two groups. Each group is to collect things that are located in the training room, and place these in a line. The group that makes the longest line will be the winner, and will receive a prize. Allow five minutes for this activity.
2. After five minutes, signal the end of the time, declare a winner and provide the prize.
3. Debrief using the following questions:
 - a. Why was one group able to make a longer line than the other group?
 - b. Which group collected the most resources (items)?
 - c. Why was one group able to mobilize more resources than the other group?
 - d. Would it have been possible to make lines this long with fewer resources?
 - e. Which resources were the most important?
 - f. Was there sufficient participation and mobilization of women during the game?
4. On newsprint, note key points and responses of participants.
5. Summarize what was learned from the game, including the views of participants.

Part B: Posters

1. Divide the participants into five groups. Each group is to respond to one of the sets of questions below, and then creatively record their responses in the form of a poster. Allow 30 minutes for groups to discuss their questions and create a poster.
 - a. ***Use of Resources.*** Do organizations require resources for implementing programs as well as for running and managing organizations? Which resources are used most often in your organization? Draw a diagram (poster) to demonstrate how they are used.
 - b. ***Access to and Control Over Resources.*** In your organization, do women and men have equal access to and control over resources, or does this differ? Which resources do men and women have access to? Which resources are controlled by men, which by women, and which by both men and women. (Consider resources such as finances, equipment,

vehicles, etc.)

- c. **Organizational Mission and Resources.** What is your organization's mission and what resources are required to fulfill that mission? How do resources contribute toward reaching your organization's mission? How do these resources contribute toward gender equality?
 - d. **Resources and Linkages.** What resources in your organization contribute to linkages? How does the mobilization of human resources (women and men) in your organization contribute to linkages and the sustainability of your organization?
 - e. **Time as a Resource.** How is time a resource for women and men in your organization? Is it more difficult for women or for men to provide resources for the organization, such as time and access to external resources? How can both women's and men's time as a resource be best used?
2. Ask groups to present their posters in plenary and describe the messages their posters portray. Display posters in the training hall.
 3. Summarize the key points made by participants about the importance of resource mobilization. Refer to previously prepared newsprint showing [Reference #3: Importance of Resources Mobilization](#). If appropriate to the literacy level of participants, distribute as a handout.

CLOSURE

Repeat the key question and ask the participants if the activity enabled them to respond to it. If necessary, clarify uncertainties.

Tips for Facilitators

The facilitator should emphasize the significance of human resources, and the need for organizations to make maximum use of this important resource.

The facilitators should note that the time and services contributed by the volunteer members of an organization are also of great importance and thus recognizing and valuing resources like time can contribute to greater organizational achievement.

Stress that time is an important resource, e.g., the contribution of time of executive committee members, general members, and volunteers. Remind participants that women tend to be more restricted than men in the amount of time available for the organization due to household duties. They also may be unable to participate in the evening or early morning due to household duties. Therefore special consideration may be necessary to mobilize women.

Stress that an important aspect of local resource mobilization is the reduction of external dependency, especially dependency on foreign donors.

Sub-Activity #1.4: Resource Mobilization and Sustainability

OBJECTIVE

Participants will be able to explain how resource mobilization is related to sustainability.

KEY QUESTION

What is the relationship between resource mobilization and sustainability?

TIME

1-2 hours

METHODOLOGY

Group work, discussion in plenary, individual reflection

MATERIALS

Newsprint, markers, masking tape, [Reference #4: Resources and Sustainability](#)

PREPARATION

Prepare chart showing the four elements of sustainability (performance, reputation, learning, adaptability). On newsprint, write the four questions that will guide the group discussions in step #2.

STEPS

1. Provide a definition of sustainability. Indicate that we have been discussing the importance of mobilizing resources in order for an organization to be sustainable.
2. Form four groups to discuss the following questions:
 - a. What are the things that contribute to an organization's sustainability?
 - b. How are resource mobilization and sustainability related to each other?
 - c. Is it possible to attain sustainability without having mobilized resources?
 - d. What are the factors that contribute to an organizations ability to mobilize resources?
3. Assemble in plenary and ask each group to report on its discussion and conclusions.
4. Introduce the idea that sustainability is affected by performance, reputation, learning and adaptation. Refer to chart prepared in advance. Discuss how these elements are related to each other. Ask participants to reflect on each element for their own organization. How well is your organization performing? Does your organization have a positive reputation? Is it a learning organization? Does it adapt to new situations?

CLOSURE

Summarize the session by emphasizing that both external factors like performance and reputation, and internal factors like learning and adaptation, continually affect the sustainability of an organization and its development.

Repeat the key question. Ask participants if the activity has enabled them to answer it. If necessary, clarify items.

Tips for Facilitators

It is important for participants to analyze thoroughly the connections between resource mobilization and sustainability in the context of their own organizations.

Sub-Activity #1.5: Hut Ram's Economic Development Triangle

OBJECTIVE

Participants will be able to explain how resource mobilization is related to sustainability.

KEY QUESTION

What is the relationship between resource mobilization and sustainability?

TIME

1 – 1 ½ hours

METHODOLOGY

Video presentation, small group work, discussion in plenary

MATERIALS

Videocassette of Hut Ram's Economic Development Triangle¹ and accompanying reference materials. (Note: Facilitators must acquire or purchase this videocassette from its developer. The tape is not provided as part of the CNGO package of materials.)

Equipment for showing videocassette

PREPARATION

Assemble equipment and materials, view tape in advance.

On newsprint, write the six questions that will guide the group discussions in step #5.

STEPS

1. Show video of Hut Ram's Economic Development Triangle.
2. Distribute reference sheet on economic development that accompanies the video.
3. Divide participants into pairs and ask them to discuss and review the video.
4. Ask participants to reflect and share their views on the video and then guide the discussion into the topic of sustainability.² (See also CNGO Training Module #2, "Group Dynamics," of Training Package #1 "Interpersonal Growth and Gender in Groups.")
5. Form four groups to discuss the following questions as they pertain to the video.
 - a. What are the three elements of the economic development triangle?
 - b. Why were some countries able to become wealthier and more developed?
 - c. Why did some countries remain small and poor?
 - d. Why have many development projects funded by donors failed?
 - e. What should organizations do to become sustainable entities?
 - f. In your organization, what balance has been achieved between human resources, material resources and financial resources?
6. Assemble in plenary. Pose questions one at a time and ask spokesperson from each group to give their group's response. Encourage discussion.

CLOSURE

Summarize the session by indicating that to be sustainable an organization must mobilize resources in three areas: human, financial and material. All three are necessary if an organization is to be

¹ Hut Ram Vaydha, "Materials, Money, and Men/Women in development" in Women Micro Credit Project, Non-Governmental Strengthening Unit, available at Samuhik Abhiyan, Kathmandu

² . See also CNGO Training Module #2, "Group Dynamics," of Training Package #1 "Interpersonal Growth and Gender in Groups."

sustainable.

Repeat the key question. Ask participants if the activity has enabled them to answer it. If necessary, clarify items.

Tips for Facilitators

It is important for participants to analyze thoroughly the connection between resource mobilization and sustainability in their own organizational context.

If facilitators wish to use this exercise, they must purchase or acquire the video separately as it is not part of this training package.

Activity Set #2: Resource Mobilization Strategy

This set of activities focuses on the ways and means by which an organization can mobilize resources. Sub-activities include:

Sub-Activity #2.1	Trends in Resource Mobilization
Sub-Activity #2.2	Options for Resource Mobilization
Sub-Activity #2.3	SWOC Analysis
Sub-Activity #2.4	Time Line Analysis and Continuum
Sub-Activity #2.5	Gender-Integrated Resource Mobilization Plans
Sub-Activity #2.6	Internal Resource Management

Sub-Activity #2.1: Trends in Resource Mobilization

OBJECTIVE

Participants will become familiar with current local, national, and international trends in resource mobilization, and begin to analyze their own methods of resource mobilization.

KEY QUESTION

What are current trends in resource mobilization by NGOs? What methods of resource mobilization are being used by your organization? What additional methods might be tried?

TIME

3 hours

METHODOLOGY

Buzz group discussion, facilitator-led discussion, group work and presentations

MATERIALS

Newsprints, markers, meta-cards, masking tape..

Reference #5: Trends in Resource Mobilization

Reference #6: Sample Format for Resource Mobilization

Reference #7: Shifts in International Funding and Aid

PREPARATION

The facilitator should read reference materials. On newsprint, write the questions that will guide the group discussions in step #1. Prepare “resource mobilization” chart that groups will complete
Assemble materials.

STEPS

1. Using buzz groups, ask participants to share their thoughts and views about current trends in resource mobilization, i.e.:
 - ? What are the primary sources of funding for NGOs?
 - ? What is the current trend of NGOs when seeking financial resources? Is the emphasis on internal resources, local resources or external resources?
 - ? What is the current trend of NGOs with respect to non-financial resources, especially human resources?
 - ? How do these trends affect an NGO’s approach to gender equality?
2. Each group is to write down the points of their discussion on a meta card and post the meta card on the board or flipchart.
3. Relate the trends identified by participants to those outlined in *Reference #5: Trends in Resource Mobilization*. Note the primary sources of funds for governments, business organizations, donors and voluntary organizations such as NGOs. Note the trend for NGOs to focus on external sources for funding (e.g., donors and government) and internal sources for non-financial resources.
4. Ask participants to compare the current trends to their own organization’s approach to resource mobilization. What methods does your organization currently use to mobilize financial resources? Non-financial resources? How do these methods differ? What other possible methods might your organization try? Do mobilization methods affect men and women differently?
5. Divide participants into four groups and give each group a blank copy of *Reference #6: Sample Format for Resource Mobilization*. Each group is to complete this chart, focusing on their own organization, how it currently mobilizes financial and non-financial resources, and what additional methods it might try.
6. Allow about 30 minutes. Then assemble in plenary and have groups present their charts.

7. Summarize the various methods identified by participants. Emphasize that different means and methods of resources mobilization are necessary for NGOs in order to make their organizations sustainable. Use participant examples in the summary.

CLOSURE

Repeat the key questions and ask the participants if the activity enabled them to respond to these. If necessary, clarify uncertainties.

Tips for Facilitators

Facilitators can draw graphs of different trends in resource mobilization on the newsprint and post them on the wall.

If appropriate for the literacy level of participants, [Reference #5: Trends in Resource Mobilization](#) and [Reference #7: Shifts in International Funding and Aid](#) may be used as handouts.

Sub Activity #2.2: Options for Resource Mobilization

OBJECTIVE

Participants will be able explain and identify options for mobilizing financial resources, and the options they are pursuing in their organization.

KEY QUESTION

What are the options for mobilizing financial resources?
What options are being pursued by participating organizations?

TIME

3 hours

METHODOLOGY

Buzz group discussion, questions/answers, chart, lecture, and presentation.

MATERIALS

Newsprint, markers, meta cards, masking tape, [Reference #8: Alternative Resource Mobilization Scheme](#)

PREPARATION

On newsprint, write the questions that will guide the group discussions in step #2. Assemble materials

STEPS

1. Open the activity by explaining that there are four main options for financing an organization: international aid and external funding from donors; self-financing from income-generating activities; local fund raising; and borrowing (See [Reference #8: Alternative Resource Mobilization Scheme](#).)
2. Form four groups and ask each group to discuss as many of the following questions in relation to their own organization as they can in the next 45 minutes. Each group should name a recorder and a reporter.
 - What resource mobilization options is your organization currently practicing?
 - Is your organization's approach to resource mobilization "strategic"?
 - Has your organization been able to choose options for raising finances that are consistent with the vision and mission of your organization?
 - Has your organization had to make any trade-offs, or has it faced any dilemmas in its choice of approaches to mobilizing financial resources?
 - What can an organization do to reduce its vulnerability and dependency?
 - When your organization has made decisions about which options to pursue, have gender issues been considered? How have gender issues affected your approach to raising finances?
 - What would need to be taken into consideration and what tools could be used to ensure a gender-sensitive approach to resource mobilization?
3. Have each group present their responses in the plenary. Encourage discussion and exchange of ideas.

CLOSURE

Repeat the key questions and ask the participants if the activity enabled them to respond to these. If necessary, clarify uncertainties.

Tips for Facilitators

If appropriate for the literacy level of participants, [Reference #8: Alternative Resource Mobilization Scheme](#) may be distributed as a handout.

In step #2, question #2, the facilitator should be prepared to explain what is meant by “strategic,” i.e., is the approach connected to the mission and goals of the organization, and is it an essential component of the overall strategy for achieving these.

Sub-Activity #2.3: SWOC Analysis

OBJECTIVE

Participants will assess their organizations' resource mobilization approach.

KEY QUESTION

What are the strengths, weaknesses, opportunities and constraints of your organization's approach to resource mobilization ?

TIME

3 hours

METHODOLOGY

Brainstorming, group work, discussion, use of formats and tools, presentation.

MATERIALS

Newsprint, markers, meta cards, masking tape,
[Reference #9: SWOC Analysis](#)

PREPARATION

On newsprint, write the questions that will guide the group in their SWOC analysis. (See step #3.) On newsprint, prepare a large SWOC chart.

STEPS

1. Pose the question: Why it is necessary to assess an organization's strategy for mobilizing resources? What can such an assessment tell us? Record major points on newsprint.
2. Explain that SWOC is a tool that can be used for assessing an organization's actual or potential ability to mobilize resources. Refer to the large SWOC chart prepared in advance, and explain how to use it.
3. Divide participants into two groups. Each group is to conduct a SWOC analysis of their organization's approach to mobilizing resources. Either distribute a blank copy of [Reference #9: SWOC Analysis](#), or have the groups create their own chart. Remind participants to think about men and women separately when identifying strengths and weaknesses and opportunities and constraints.
 - ? What are the strengths and weaknesses for resources mobilization in your organization?
 - ? What opportunities and constraints do you see for resource mobilization in your organization?
4. Allow 30 to 45 minutes for groups to complete their analyses. Then assemble in plenary for presentations and discussion of the following:

CLOSURE

Repeat the key questions and ask the participants if the activity enabled them to respond to them. If necessary, clarify uncertainties.

Tips for Facilitators

If participants are from the same organization, you may have them make one presentation, rather than two, which could be repetitive.

Presenters can take turns identifying strengths, weaknesses, opportunities and constraints, until neither group has anything more to add.

Sub-Activity #2.4: Time Line Analysis and Continuum

OBJECTIVE

Participants will analyze their organization's achievements and challenges in mobilizing resources, and will assess the level of mobilization of different types of resources.

KEY QUESTION

What has your organization gained from resource mobilization and how was this achieved?

What challenges has your organization faced in mobilizing resources?

What resources does your organization mobilize well, and what resources could it seek to mobilize better?

TIME

2 hours

METHODOLOGY

Group work, presentation and discussion

MATERIALS

Newsprint, markers, meta cards, masking tape,

[Reference #10: Time Line Analysis of Resource Mobilization](#)

[Reference #11: Continuum of Current Resource Mobilization](#)

PREPARATION

Prepare handout of time line analysis example, or copy this onto newsprint. Prepare and copy blank time line tool and continuum for group work. Assemble materials.

STEPS

1. Explain that another tool that can be used to analyze the effectiveness of resource mobilization is a time line tool. Distribute handout of the time line example, or refer to a previously prepared newsprint version, and describe the tool. (See [Reference #10: Time Line](#)).
2. Divide participants into two groups. Provide them with a blank copy of the time line tool, and have them complete it.
3. Allow 45 minutes to one hour, then assemble in plenary for presentations and discussion of the following questions:
 - ? What types of resources is the organization mobilizing well?
 - ? What types of resources could it better mobilize?
 - ? What achievements were gained from mobilization of different resources?
 - ? What challenges does the organization face when mobilizing different resources?
 - ? What is the role of women and men and how do they participate and benefit?
 - ? Are the achievements consistent with the vision, mission and goals of the organization?
4. Distribute [Reference #11: Continuum of Current Resource Mobilization](#) to each group and ask them to place their organization in the continuum of different resources mobilization at present. Have groups assess women and men human resources separately.
5. Allow about 15 minutes, then assemble in plenary. Display the large continuum chart (previously prepared), and have a reporter from each group mark their rating on the chart. Discuss any discrepancies. Note the resources that the organization is most successfully mobilizing and those that are not well mobilized. Ask participants how they might be able to use this chart and the previously prepared time line analyses in their organization.
6. Review the points of participants. Highlight that we should be able to assess which resources should be mobilized more. Stress that there should be continued efforts to mobilize resources that are low on the continuum and that can contribute to the organization fulfilling its mission and goals.

CLOSURE

Repeat the key questions and ask the participants if the activity enabled them to respond to them. If necessary, clarify uncertainties.

Tips for Facilitators

The facilitator may need to provide ideas and examples to the groups to assist them complete the time line analysis chart. The facilitator should circulate during the group work and offer assistance as required.

Sub-Activity #2.5: Gender Integrated Resource Mobilization Plans.**OBJECTIVE**

Participants will be able to formulate resource mobilization plans.

KEY QUESTION

How can the organization plan for resource mobilization?

TIME

3 hours

METHODOLOGY

Brainstorming, small group discussion, lecture, use of formatted worksheets, and presentation.

MATERIALS

Newsprint, markers, meta cards

Reference #12: Steps in Mobilizing and Using Resources

Reference #13: Template for Developing a Resource Mobilization Plan

PREPARATION

The facilitator should read and become familiar with the relevant reference material.

Prepare blank template from *Reference #13: Template for Developing a Resource Mobilization Plan* for group work.

STEPS

1. Indicate to participants that in this activity we will be learning how to develop a resource mobilization plan. Ask participants why it is important for an organization to have a resource mobilization plan? Summarize responses on newsprint, e.g.,
 - ? We will be more successful in achieving our mission and goals if we have a clear plan.
 - ? We can't expect resources to automatically appear.
 - ? It helps to increase the available financial and non-financial resources.
 - ? We will be more efficient and more successful in mobilizing needed resources if we have a clear plan. It is just good management.
 - ? A clear plan will help keep us on track in involving and benefiting both men and women.
2. Brainstorm with participants what they see as the major steps in developing a resource mobilization plan. What is the first thing to do? The second? etc. As participants respond, write main points on flipchart. Present the steps listed in *Reference #12: Steps in Mobilizing and Using Resources*, and relate these to the steps identified by participants.
3. Form groups of four or five persons, or organization-specific groups if more than one organization is participating in the workshop. Each group is to complete a resource mobilization plan template for an activity or undertaking of their organization. Hand out template (*Reference #13: Template for Developing a Resource Mobilization Plan*)
4. Allow about 45 minutes, then have groups present their plan in plenary. Discuss each item, noting where and how gender is integrated.

CLOSURE

Repeat the key question and ask the participants if the activity enabled them to respond to it. If necessary, clarify uncertainties.

Tips for Facilitators

Facilitator should ensure that participants consider resource contributions other than just financial, i.e., contributions of time, skills, materials, goods and services. Organizations should plan for mobilizing non-financial resources as well as financial resources.

Facilitators should ensure that the plan is gender sensitive and supports an organizational vision of gender equality.

The facilitator should circulate when the groups are preparing their plans and offer assistance, explanations and encouragement.

Sub-Activity #2.6: Internal Resource Management

OBJECTIVE

Participants will understand the importance of internal resource management and develop a system and policy guidelines for good management of the resources of the organization.

KEY QUESTION

How can we effectively manage the resources of the organization?

TIME

3 hours

METHODOLOGY

Question and answer, use of case study, group discussion, and presentation

MATERIALS

Newsprint, markers, meta cards, masking tape, [Reference #15: Case Study](#)

PREPARATION

Prepare questions to be asked to participants

Prepare handout of [Reference #15: Case Study](#)

STEPS

1. Indicate that in this activity participants will be asked to think about the way their organization manages its internal resources. Form four groups and give each group one set of questions for discussion:

Group #1:

- ? Do you think your internal resources are being well managed?
- ? Is an internal management system in place, and is it functioning well?
- ? How does your organization ensure that its internal resources are being managed in effective and efficient ways?
- ? How can your organization find new sources of internal resources, e.g. more volunteers (women and men), better use of equipment by both women and men, etc.?

Group #2:

- ? Is there a fair balance in the allocation of financial resources between program activities and the development of the human (women and men) resources of the organization?
- ? What would happen if all of your financial resources were allocated to either program activities, or to developing the human resources of the organization?
- ? Are resources allocated fairly to women and men?

Group #3:

- ? What will happen if the time and volunteer activities of executive members, and general members are not recognized as resources?
- ? Is the organization able to retain and motivate women volunteers as well as men?
- ? Are special actions needed to support women volunteers?

Group #4:

- ? Who has more (women or men) access and control in financial and physical resource management in your organization?
- ? Do women hold decision-making positions?
- ? How do women's decisions influence the overall management of internal resources?

2. Have each group present their group exercise in the plenary. Encourage discussion.
3. Re-form the groups and distribute [Reference #15: Case Study](#) on empowerment and organization. Each group is to read the study and analyze it using the questions provided.
4. Form groups by organization and ask them to prepare guidelines for internal resource management. Let the group present it in the plenary and with discussion refine the guidelines, ensuring that both women and men's roles are considered.
5. Summarize the session with incorporation of views of participants. Emphasize that for the sustainability of an organization, internal resources play a major role and should be given high priority. Also, management of internal resources must be gender sensitive. Thus the effective use of internal resources should be strengthened and an internal resource management guideline formulated.

CLOSURE

Repeat the key question and ask the participants if the activity enabled them to respond to it. If necessary, clarify uncertainties.

Tips for Facilitators

The facilitator can form groups by organization and according to the number of participants.

The facilitator should emphasize that there should be equitable sharing in the distribution system of internal resources, management of internal resources, composition of organization, and responsibilities.

[Reference #14: Resource Allocation Plan](#) contains an example of a resource allocation plan that an organization might develop as part of its internal resource management plan. This is included for reference only.

Activity Set #3: Gender Responsive Proposal Development

This set of activities focuses on the development of proposals as a means of mobilizing resources, particularly financial resources. Sub-activities include:

Sub-Activity #3.1: What is a Proposal?

Sub-Activity #3.2: Types of Proposals

Sub-Activity #3.3: Basic Information Requirements for a Proposal

Sub-Activity #3.4: Proposal Writing Exercise

Sub-Activity #3.1: What is a Proposal?

OBJECTIVE

Participants will be able to define what a proposal is, and describe the importance of proposals.

KEY QUESTION

What is a proposal? Why are proposals important for resource mobilization?

TIME

3 hours

METHODOLOGY

Group discussion, group interaction

MATERIALS

Newsprint, markers, masking tape, meta cards, [Reference #16: Proposals](#)

PREPARATION

Write on newsprint or meta cards a few definitions of proposals, and display these in the meeting room. (See [Reference #16: Proposals](#)). On newsprint or a meta card, write out the questions to guide the group #1 discussion in step 1.

STEPS

1. Form two groups, a group of participants that has had experience working on a proposal, and a group or participants that has little or no proposal writing experience.

Group #1: Those that have Developed a Proposal. Group one is to sit in the centre of the training hall and share and discuss their experience in writing a proposal and the lessons they learned.

? Why did you write the proposal?

- To whom did you submit the proposal?
- What were you proposing?
- Was gender integrated into the proposal, and if so, how?
- Was the proposal successful?
- What lessons did you learn about writing proposals?

Group #2: Those that have never Developed a Proposal. Group #2 is to listen carefully to the discussion to see what they can learn about proposal writing. They should make a note of any questions they have.

Facilitator. The facilitator is to listen to the discussion and record main points related to:

- ? the reasons the proposal or proposals were written;
- ? who the proposal was submitted to (e.g., donors, government, NGOs, etc.);
- ? what was proposed and whether gender was integrated and how;
- ? the reasons the proposal was successful, or not successful.

2. Open the discussion to both groups. Group #2 is to ask questions, and group #1 is to respond and provide additional information. During this discussion among participants, the facilitator should add to his or her notes on the main points.
3. Summarize the main points from the discussion. Note that:
 - ? proposals are one way of raising funding so that the organization can carry out its mission and goals;
 - ? proposals are always submitted to an organization (e.g., a donor, an INGO, local government, sometimes proposals are submitted internally to the executive committee, etc.);
 - ? that sometimes proposals are written at the request of funders, and other times they are unsolicited, i.e., initiated by the NGO that is making the proposal;

- ? that integrating gender into a proposal is important for a gender resource organization in order to be consistent with the organization's mission and goals.

CLOSURE

Repeat the key question and ask the participants if the activity enabled them to respond to it. If necessary, clarify uncertainties.

Tips for Facilitators

The facilitator can add and briefly explain the functions or purposes of a proposal (see [Reference #16: Proposals](#))

The facilitator should note that DDCs, VDCs and financially sound NGOs could be funders, depending on the size and nature of projects.

Sub-Activity #3.2: Types of Proposals

OBJECTIVE

Participants will be able to name a variety of activities for which proposals might be written.

KEY QUESTION

For what types of activities might an NGO prepare a proposal?

TIME

3 hours

METHODOLOGY

Group work and presentations, facilitator-led discussion

MATERIALS

Newsprint, markers, masking tape, meta cards, [Reference #16: Proposals, section on Types of Projects or Activities Proposed](#).

PREPARATION

On newsprint, write out step #1 instructions and display in meeting room.
Assemble materials,

STEPS

1. Divide participants into two heterogeneous groups. Give each group several meta cards. Instruct participants that on each meta card they are to list:
 - ? a proposal their organization has written;
 - ? the main objective or objectives of the proposal and the types of activities that were proposed (e.g., training, research, etc.);
 - ? whether the proposal was gender-specific or included activities that were gender inclusive.The group is to then sort their proposals (meta cards) into different categories of proposals based on the types of **activities** that were proposed.
2. Allow about 30 minutes for group work. Then have each group present and explain the way they sorted their cards. Discuss whether the proposals represent a variety of activities, or whether they are mainly in one category.
3. From the presentations and meta cards, draw out the different types of activities that the proposals have included (e.g., programs or projects, research, planning, training, technical assistance). If all types of activities are not mentioned in the proposals identified by participants, ask them what other types of activities might be proposed.
4. Summarize the session by reviewing the various types of proposals that can be developed. Highlight that all types of proposals should be gender sensitive.

CLOSURE

Repeat the key question and ask the participants if the activity enabled them to respond to it. If necessary, clarify uncertainties.

Tips for Facilitators

Before proceeding with this activity, the facilitator should determine whether the participating NGOs have completed any proposals. If they have not, steps #1 and #2 should be omitted, and the facilitator should begin by presenting the different types of proposals outlined in [Reference #16: Proposals, Types of Projects or Activities Proposed](#).

If several organizations are attending the workshop, the facilitator should form groups on the basis of organization.

Groups should complete as many meta cards as they can, up to a maximum of about five. Some NGOs may not have completed any proposals.

The facilitator should be aware that there is no single “correct” way to sort the cards, and the groups might be quite creative in the way they do this.

Often proposals contain more than one type of activity (e.g., training and technical assistance), etc.

Sub-Activity #3.3: Basic Information Requirements for a Proposal

OBJECTIVE

Participants will be able to identify the basic information requirements for writing a proposal.

KEY QUESTION

What are the basic pieces of information are required to write a proposal?
How can proposals be structured?

TIME

1 – 1 ½ hours

METHODOLOGY

Facilitator-led discussion, review and discussion of handouts

MATERIALS

Newsprint, markers, masking tape, [Reference #17: Basic Information Needs for Writing a Proposal](#), [Reference #18: Organizing a Proposal](#), [Reference #19: Sample Format of a Proposal](#)

PREPARATION

On a sheet of newsprint, write the headings why, what, who, how, where, when, how much and to whom. Prepare handouts ([References 17, 18 and 19](#))

STEPS

1. Explain that the purpose of this activity is to look at the information that a proposal writer needs in order to prepare a good proposal. Indicate that these information needs can be thought of as the **why, what, who, where, when** and **how** of proposal writing. Ask participants, What are the main pieces of information that a proposal writer needs? As participants respond, note their responses under the appropriate headings on the newsprint (i.e., why, what, etc.)
2. Distribute the handout, [Reference #17: Basic Information Needs for Writing a Proposal](#), and review it with participants.
3. Indicate that once basic information needs have been identified, the next step is to organize this information into a structure for a proposal. There is no single “correct” way to present the information in a proposal. Often the funding agency has a specific format that should be followed. Other times it is up to the proposal writer. Distribute the handouts, [Reference #18: Organizing a Proposal](#) and [Reference #19: Sample Format of a Proposal](#). Discuss the examples and where in each heading the why, what, who, where, when and how questions fit.
4. Summarize the session by emphasizing that basic information should be systematically and logically included in the proposal. Also explain that there is no any hard and fast structure or format for a proposal, and that different funders have different requirements.

CLOSURE

Repeat the key question and ask the participants if the activity enabled them to respond to it. If necessary, clarify uncertainties.

Tips for Facilitators

Facilitators can draw illustrations or develop chart showing different proposal structures.

Organizations should develop their own structures based on their own needs, and the needs of the funders to which they send the proposals.

Facilitators should ask participant to recall proposals they have written when thinking about basic information and structure.

Facilitators might collect examples of proposals for participants to examine for information and ideas.

Sub-Activity #3.4: Proposal Writing Exercise

OBJECTIVE

Participants will be able to shape a good proposal.

KEY QUESTION

How can we shape a good proposal?

TIME

3 hours

METHODOLOGY

Group discussion and writing exercise, exchange of ideas, presentation, and review.

MATERIALS

Newsprint, markers, A4 size paper, pens, [Reference #17: Basic Information Needs for Writing a Proposal](#), [Reference #18: Organizing a Proposal](#), [Reference #19: Sample Format of a Proposal](#)

PREPARATION

Assemble materials.

STEPS

Indicate to participants that in the previous activities they learned about the basic information needs for a proposal, and reviewed some of the ways to organize these into a proposal format. In this activity, they will be putting together a simple draft proposal.

1. Divide participants into organization-specific groups. If only one organization is participating in the workshop, divide into two or four groups. Steps to be followed in each group are:
 - a) identify a simple project
 - b) discuss the why, what, who, when, where and how of the proposed project [Reference #17: Basic Information Needs for Writing a Proposal](#)
 - c) divide responsibilities in the group and have each member write a short response to one of the questions
 - d) organize the written information into a proposal format, e.g., [Reference #19: Sample Format of a Proposal](#)
2. Allow about two hours for the proposal writing exercise. Then have each group exchange proposals with another group. The groups should review one another's proposals, applying a gender lens, and then give comment and feedback to the other group.
3. Where appropriate, groups should incorporate suggestions and points from the review of their proposal.

CLOSURE

Emphasize that proposal writing is an art and it demands specific skills that not everyone has or is interested in having. Like all skills, they need to have continued practice and should be followed the principle of draft, redraft, draft, and redraft for improvement of writing skills and quality production.

Tips for Facilitators

Groups should be formed by organization. If there are a significant number of participants from a single organization, then the facilitator should form two sub-groups from that organization.

There should be an even number of groups (i.e., two or four) so that groups can exchange their proposals.

While preparing proposals women and men stakeholders from the community should be consulted and included to make the process participatory.

SECTION 3: REFERENCE MATERIALS

Reference #1: Definition of Resources

Definition 1

Resources are the materials, things, and services that help to fulfill human and organizational needs.

Definition 2

Resources are materials, finance, men and women, means, and time that are used and mobilized to meet the objectives of groups, organizations, and individuals.

Reference #2: Classification of Resources

Types of Resources	Examples of Resources Available in the Local Area	Examples of Resources that are not Available or that are Difficult to Acquire in the Local Area
1. Resources Categorized by their Physical Traits and Characteristics		
a) Human Resource (Women and Men)	Educated (literate) women and men, carpenter, mason, semi-skilled labors.	Engineer, Overseer, Doctor, Trained men and women.
b) Natural Resource	Forests, rivers, land, stone, etc., (depends on the area)	Water, arable land, etc. (depends on the area)
c) Physical Resource	Plough, spade, table, pick	Polythene pipes, GI pipes, corrugated sheet, and cement.
d) Financial Resource	Local funds	External funds
2. Resources Categorized as Internal or External to the Organization		
a) Internal resource	Membership fees, special contribution of cash and kind, staff, board and general members of organization, volunteer members, equipment, land, office building, furniture, time contribution.	Time availability of board, general, volunteer members.
b) External resource	Influence of DDC and government offices. Technical and financial support of development organizations like INGOs.	Funds and equipment
3. Resources Categorized by Geographic Location		
a) Local (community level) resource	Community, CBO, VDC, and DDC members, local forests, rivers, land, stone, locally made equipment, etc.	Time contribution, money, and technical services.
b) Resources outside the community	National and international organizations working in the community, or with programs that area available to the local community	National and international organizations and resources located outside local area

Adapted from Community Resource Mobilization Manual (Part I), LDTA, Kathmandu

Reference #3: Importance of Resources Mobilization

Resource mobilization is essential for the existence of a healthy organization. An organization cannot exist without resources. They are needed to provide continuity and stability to the organization and its work.

An organization needs resources in order to:

carry out its ongoing work, aimed at achieving its mission and goals;

undertake new work or initiatives;

maintain and increase linkages with the community, individuals, government agencies, private organizations, and funding organizations;

develop various aspects of the organization, e.g.,

- ❑ develop into a learning organization;
- ❑ maximize organizational knowledge and skills;
- ❑ develop leadership capacity;
- ❑ increase gender awareness and skills within the organization;
- ❑ improve management capabilities, including the ability to manage resources (e.g., strategic management of excess resources, ability to carry out cost-benefit analyses, ability to develop resource generation schemes, diversification of resource sources, decrease in dependence on foreign donors, etc.);

Reference #4: Resources and Sustainability

Reference Sources

Facilitators who are interested in further exploring the relationship between resources and sustainability might want to acquire the following publication by Allan Fowler.

Allan Fowler; *"The Virtuous Spiral, a guide to sustainability for NGOs in international development,"* Earthscan Publication Ltd, 2000

This book notes the importance of sustainability and provides practical guidance on how to achieve it. Fowler outlines three kinds of sustainability: 1) making the impact of the organization's work sustainable, 2) ensuring continuity of funding, and 3) making the organization itself sustainable to remain viable. Achieving all three creates a virtuous spiral.

There are twelve sections in the book: 1) What does sustainable development mean for NGOs? 2) Interventions for Sustainable Local Impact 3) Framework and Indicators 4) Options, Strategies and Trade-Offs in Resource Mobilization 5) Mobilizing Non-financial Resources 6) Commercialization 7) Finance from other Sources 8) Strategic Choices for Sustaining Financial Resources 9) Regeneration through Learning 10) Regeneration through Change 11) Regeneration through Leadership 12) The Leader's Legacy -Creating a Virtuous Spiral

Fowler outlines four elements in the organizational sustainability spiral: 1) performance or how well the organization performs in the community and society; 2) reputation or credibility, which is connected to how well the organization performs; 3) the extent to which the organization is continuously learning and building new knowledge, and 4) the ability of the organization to change itself and adapt to new situations.

Elements of Organizational Sustainability
1. Performance
2. Reputation
3. Learning
4. Adaptability

Another useful source is:

Michael Edwards and Alan Fowler, eds. *"The Earthscan Reader on NGO Management,"* Earthscan Publication Ltd, UK, May 2002

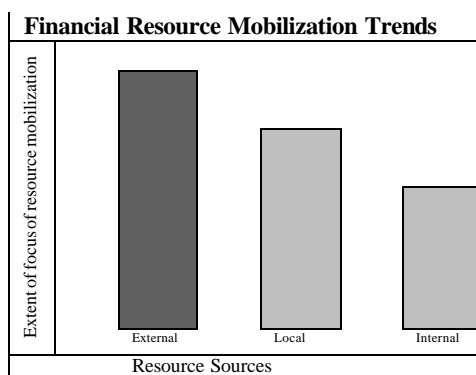
Reference #5: Trends in Resource Mobilization

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Financial Resources

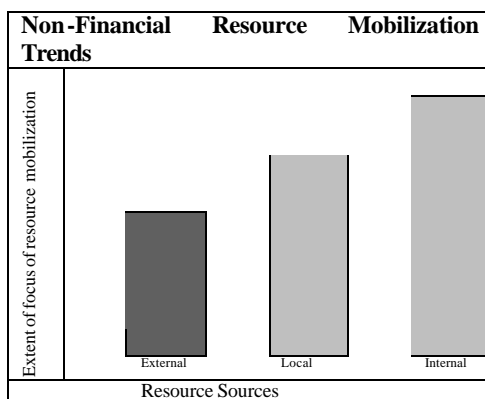
Resource (Organizations)	User	Primary Source of Financial Resources	Use of Financial Resources	Beneficiaries
Government		Taxes paid by citizens	Public services	Public
Business organizations		Investors (shareholders, banks), Customers	Products and services	Customers and users of products and services
Donors		Government	Projects and Services	Target organizations and individuals
Voluntary Organizations (NGOs, CBOs, etc.)		Donors Government	Projects and Services	Primary Stakeholders

The trend is for NGOs to place more emphasis and value on mobilizing external resources than on local and internal resources. NGOs need to critically examine their tendency to emphasize external resources such as donors, and find ways to maximize local and internal financial resources.



Non-Financial Resource Mobilization

NGOs have to depend on their general members, volunteers, and non-paid staff members to achieve their organization's mission. Thus, they have to maximize internal resource mobilization. The next more frequent source of non-financial resources is the local physical resource base. Thus, the trend in non-financial resource mobilization is lower emphasis on external resources, and higher emphasis on internal resources.



Reference #6: Sample Format for Resource Mobilization

Sources of Funds or other Resources	Current methods and activities of resources mobilization and resource development	Possible ways for effective resources mobilization.
I. FINANCIAL RESOURCES		
<u>Example</u> Local individuals and organizations	Donation Box placed only at office. Letter appeal distributed to limited individuals, groups, and institutions.	Place donation box at some important public places and key organizations. Make linkages with individuals and groups for their contribution. Prepare qualitative and informative letter appeal and distribute to prospective donors, individuals, groups, and charity organizations. Increase level of linkages with local, national, and international organizations.
2. NON-FINANCIAL RESOURCES		
<u>Example</u> Internal funds	Purchased overhead projector, computer, telephone, cutlery etc.	Rent these items.
Internal (male and female staff members, volunteer members, and general members)	Activities aimed at increasing the capacity of individual members (e.g., training).	Full involvement of male/female members of organization.

Reference #7: Shifts in International Funding and Aid

Under early aid efforts, donors:

- funded projects that extended the influence of the donor;
- considered poverty as a destabilizing force for globalization; international aid to reduce poverty funding was seen as a stabilizing force;
- made funding available for market expansion;
- sought to foster political reform and democracy;
- sought to reduce migration pressure to developed countries.

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Much of the funding/aid provided using the above approaches was ineffective, and the level of sustainability was low. In response, donors are:

- moving to policy based funding – donors are interested in supporting policies that correspond to the perceived needs of the recipient country;
- moving to unified funding frameworks and local government ownership; large donor agencies and consortiums of donors are moving to harmonize aid/funding packages that stress the importance of local government ownership of projects and initiatives funded with donor support;
- asking governments in receipt of international funding to be responsible and accountable;
- promoting multi-actor partnerships between government, business and civil society;
- recognizing gender and poverty as determinants of health, stability and good governance.

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Reference #8: Alternative Resource Mobilization Scheme

NGOs can engage in four types of financing.³ Some NGOs engage in all four types, others are heavily reliant on one or two types.

1. International Aid and External Funding from Donors. While this type of financing is often attractive to NGOs, it can make an NGO vulnerable. NGOs who are heavily dependent on aid funding are at risk when this type of funding ends.

2. Self-Financing. These finances are generated through:

- Sale of **products and services**, which used to be free, including sale of expertise
- Fees and subscriptions
- Interest from investment

3. Local Fund-Raising. An NGO can raise funds locally through:

- donations from the general public: mailing, appeals, special events, campaigns, games and lotteries;
- assistance and support from the national government, e.g., grants, project financing, tax exemptions, capital goods, expertise;
- assistance and support from local governments-similar to national government;
- assistance and support from local charities and foundations;
- assistance and support from local corporations and businesses.

4. Loans. An NGO might borrow money, e.g.,

- Venture capital (repayable) to help an NGO engage in a viable commercial activity, purchase a subsidiary, or build on land as an investment
- Funds to establish a revolving loan and credit fund. The intention here would be that the fund would become self supporting and would produce a surplus as income

³ Additional analyses on the topic of resource mobilization can be found in Allan Fowler, *Striking a Balance*, Earthscan Publications, U.K., April 1997. Fowler suggests that there are three alternatives to continued reliance on international aid and external funding from donors. These are **self-financing** (generating funds from income-generating activities); **local fund raising** (tapping economic surpluses generated in country); and **external financing** directed specifically at organizational sustainability.

Reference #9: SWOC Analysis

A SWOC analysis is a framework for analyzing the internal and external factors that influence the functioning of an organization. An organization can use the SWOC tool to analyze their organization's resource mobilization. SWOC stands for:

S = Strengths
W = Weaknesses
O = Opportunities
C = Constraints

Strengths and weaknesses are internal to an organization and hence they are under the control of an organization, which means organizations can increase their strengths and eliminate their weaknesses during the course of mobilization of resources. Opportunities and constraints, however, are external and are beyond the control of an organization. Organizations should draw on their strengths for resource mobilization and should overcome their weaknesses so that opportunities for resources mobilization are maximized and constraints are minimized.

A SWOC Analysis Chart

Strengths The factors of an organization that are functioning well for resource mobilization.	Weaknesses The factors of an organization that are not functioning properly in mobilizing resource.
For example: Active and dedicated executive committee and staff members Qualified gender sensitive personnel Clear vision Goodwill of an organization etc.	For example: Unclear roles and responsibilities Low level of experience in resources mobilization Communication gap Lack of skilled and trained staff members
Opportunities The external factors promoting the organizations ability to mobilize resources	Constraints The external factors preventing/hindering the organization's ability to mobilize resources
For example: Presence of donor organizations Donor organizations are interested in funding collaborative schemes. Collaboration with other agencies for program expansion Available local resources Community support organizations	For example Increase in the competition for local and external funds. Decrease in motivation No women on the executive

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Reference #10: Time Line Analysis of Resource Mobilization

A time line helps to document and measure an organization's accomplishments in mobilizing resources. It also shows trends in how the growth of an organization is taking place. An example of a time line is given in the chart below.

#	Types of resources mobilized	Achievement gained from resource mobilization	When	How this achievement was gained	Challenges faced during resource mobilization
1	Human (Male and Female)	<ul style="list-style-type: none"> Policy and procedures of organization are ready. 3-year program plans developed. Successful to get grants worth of Rs 500,000.00 Attraction and retention of women staff and volunteers. 	2056 BS 2057 BS 2058 BS	<p>By increasing skills of executive members and staffs.</p> <p>By developing and assigning specific responsibilities to staffs and executives members.</p>	<p>Executive members and volunteers are unavailable to give their full time.</p> <p>Turn over of skilled staffs and executive members.</p>
2	Financial	<ul style="list-style-type: none"> Program expansion of newer geographical areas. Services reached to population of 1000 Production of trained and skilled staffs and members. 	2056 BS 2057 BS 2058 BS	<p>By establishing linkages with local and outside donor organizations.</p> <p>By getting submitted proposal approved.</p> <p>By preparing result oriented program plans.</p>	<p>Low level of awareness among the beneficiaries.</p> <p>Non-available of funds on time.</p>
3	Physical	<ul style="list-style-type: none"> Use of furniture and equipment created office-working environment. Use of additional equipment increases the efficiency of works. 	2056 BS 2057 BS	<p>By managing furniture and equipment.</p> <p>By doing additional management of equipment.</p>	Scarcity of budgets.
4	Local	<ul style="list-style-type: none"> Community people and CBOs were got more involvement in different program activities. Project completion was on time. Local people were aware and sensitized on gender issues. Good linkages between NGOs, VDC, and CBOs. 	2056 BS 2057 BS 2057 BS 2058 BS	<p>By implementing people based program activities.</p> <p>By adopting participatory implementation process.</p> <p>By utilization of local resources like support of VDC and CBOs members.</p>	Time availability of community people.

Reference #11: Continuum of Current Resource Mobilization

Every NGO mobilizes different resources while trying to reach their organization's vision and mission. The basic difference is that some NGOs might focus on human (women/men) resources; some NGOs might focus on financial resources and some NGOs might give more attention to other resources that are very much contextual to their organizations. Whichever resources they chose to mobilize for attaining their organization's mission, they must know where they stand in the continuum of current resource mobilization. Knowing the organization's location in the continuum of current resource mobilization can help each of the NGOs to plan so that they can focus on increasing particular resources to meet their organization's needs. The use of this continuum can assist NGOs in doing self-assessments to ensure that available resources are being mobilized effectively.

Types of Resources	Level of Mobilization		
	No mobilization or very little	Mid-range Mobilization	High Level of Mobilization
	Poor 0	50	Excellent 100
Human Resources			
▪ Women			
▪ Men			
Financial Resources			
Physical Resources			
Internal Resources			
External Resources			
Local Resources			

Reference #12: Steps in Mobilizing and Using Resources⁴

A. DEVELOPING A RESOURCE MOBILIZATION PLAN

1. **Define the Purpose**
The first step is to state the purpose, goals or planned activities for which the organization wants or needs to mobilize resources.
2. **Analyze Human and Material Resource Needs**
The second step is to determine the human and material resources that the organization needs to achieve the stated purpose, goals or activities identified in step #1. In order to estimate these needs, the organization may have to develop a detailed implementation plan for the activity.
3. **Assess Funding Requirements**
Step #3 is to determine which of the needed human and material resources can be fulfilled through contributions or non-financial means, and which require funding. What does the organization need in terms of contributions, and how much funding is required?
4. **Assess Financial and Non-Financial Resource Sources.**
The fourth step is to identify the sources of the needed resources. Who are the potential contributors to meet both the financial and the non-financial resource needs?
5. **Identify the General Approaches to Resource Mobilization that will be used and the Contributors that will be Approached**
Step #5 involves analyzing the costs and benefits, both long and short-term, of different approaches. For example, a monthly collection of Rs 500 from 1000 people might cost more than a single gift but offers long-term continuity. This analysis leads to the identification of general approaches to be used and specific contributors to be approached
6. **Develop a Plan of Action.**
For each approach or contributor, state the actions or steps the organization will take to approach the contributor, when this will occur, and who will be responsible.
7. **Develop a Collection System and a Plan for Accountability and Protection**
Step #7 is to decide how the funds and other resources will be collected or acquired. In addition, it is important to have a system of accountability in place so that contributors know that their contribution is received and used as intended. It is also important to have a system in place to protect those collecting cash or other items, so that they are not at risk personally and so that they are not vulnerable to charges of theft.

B. IMPLEMENTING THE PLAN AND USING THE RESOURCES

Once the plan for mobilizing resources is in place, the next step is to implement it (i.e., collect the resources), and then use them for the intended purposes. Steps include:

1. **Carry out the Plan of Action and Mobilize the Resources.**
Put strategies and plans into action.
2. **Collect and Allocate the Resources**
Implement the activities for which the resources were raised.

⁴ These steps are adapted from the 10 sequential steps listed by Allan Fowler in *Striking a Balance*, Earthscan Publications, U.K., April 1997.

3. **Monitor Activities and Resource Utilization**
Collect information on what is being done and how it is achieved.
4. **Communicate back to contributors**
Report to contributors on what has been done and what has been achieved. It is important to let them know that their help has made a difference.
5. **Report to the members and constituents of the organization**
As part of the regular reporting process of the organization, members and constituents should be informed about the resources that were received, how they were used, and what were the results.

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Reference #13: Template for Developing a Resource Mobilization Plan

1. Purpose: For what purpose, goals or planned activities does the organization want or need to mobilize resources?

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2. Human and Material Resource Needs. What human and material resources will the organization need to achieve the purpose or goals, or carry out the planned activity? (Where feasible, this should come from the organization's detailed plan for the activity.)

Type of Resource	Sub-Category	Number to be Mobilized	
		Paid	Volunteers
Human Resource	Board Members (Male)		
	Board Members (Female)		
	Board Members (Total)		
	Women Staff		
	Men Staff		
	Total Staff		
	Community Members (Male)		
	Community Members (Female)		
	Community Members (Total)		
		Quantity	
Equipment and Materials			

3. Funding Requirements. How much money does the organization need to achieve the purpose or goal, or carry out the activity? What non-financial contributions are needed?

Funding Requirements	Amount	Non-Financial Contributions
Salaries and Fees		
Equipment and Materials		
Expenses		
TOTAL		

4. Funding Options. What are the options for raising needed funds or other needed resources (e.g., land)?

Sources of Funds or Resources	Specific Sources (Potential)	Feasibility (low, medium or high)
1. Non-financial resource needs (list these)	List potential contributors	
2. Financial Resources (list amount needed)	List potential sources and specific contributors (See reference #8)	
	Self-financing options (specify)	
	Local fund raising options (specify)	
	Loan options (specify)	
	International aid and donors (specify)	

<p>7. Collection and Accountability Plan. For each resource source or contributor, how will the organization collect the funds and account for these.</p>

Reference #14: Resource Allocation Plan

A resource mobilization plan (see reference #13 above) should be accompanied by a resource allocation plan for the organization. Following is an example.

#	Amounts to be mobilized	Types of resources to be mobilized		Areas of resource mobilization	Process	By when	Person Responsible (Woman or man)
		Finance	Non-finance				
1	Rs 50,000	Finance/Cash	Board Members, Volunteers Community people Women and men	Gender awareness training	<ul style="list-style-type: none"> Prepare detail implementation plan. Implementation of plan and delivery of services to communities. Prepare community participation strategy. Follow up and monitoring. Review meeting. Documentation. 	By July 2002	Chairperson Secretary, Treasurer.
2	Rs 200,000	Finance/Cash	Board members Community people Volunteers	Literacy program	<ul style="list-style-type: none"> Prepare detail implementation plan. Implementation of plan and delivery of services to communities. Prepare community participation strategy. Follow up and monitoring. Review meeting. Documentation. 	By April 2002	Chairperson, Secretary, Treasurer.
3	Rs 60,000	Finance/Cash	Equipment /in kind.	Institutional development	<ul style="list-style-type: none"> Prepare procurement plan. Prepare inventory Monitor best use of equipment, goods and efficiency in the works Documentation 	By June 2002	Chairperson, Secretary, Treasurer.

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Reference #15: Case Study

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Society for Empowerment: Inconsistency in saying and doing

Prepared by: Neeralia Tiwari

Society for Empowerment (SOFEM) is a non-governmental organization, which was established in 2040 BS. The major objectives of SOFEM are to conserve the environment and to work for gender equality. There are altogether 40 members in this organization. Out of these 40 members; 3 members are female and the rest are male members.

With the financial support of donor organizations, SOFEM has recently conducted research work in the field of health. Instead of working in line with its objectives SOFEM demonstrated a donor driven attitude. The donor organization wanted to make a study about the factors that affect health and effectiveness of those organizations that are working in it. Despite the objectives of SOFEM, it easily accepted the financial support of donor organization. The works that SOFEM undertook were different than that of the felt needs of community people. As a result, community people did not show any interest in the project. The interest was only for representative of donor organization and few people of SOFEM. The staff person of SOFEM, who was responsible to manage this task, began to spend a big portion of funds only in the name of research and report writing. The remaining budgets were used for expenses such as, electricity, telephone, and snacks served during the meeting. There are nominal saving in the bank accounts. For the best utilization of available skilled human resource SOFEM did not even establish linkages with concerned government offices, private sectors, and local organizations. The expenditures and incomes of SOFEM remained the same. SOFEM began to conduct activities not manifested in its constitution. As a result, members of SOFEM got confused and did not extend their cooperation to SOFEM activities. In addition, SOFEM recently passed the resolution not to take annual renewal fees from its old members.

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In the annual meeting of DDC, the DDC allocated 5% of its budget for environmental conservation and gender equality and announced that it planned to implement this program through committed local organizations that could reach the target population. No local organization has worked in these sectors previously. Non-availability of such organizations compelled the DDC to freeze these budgets. Some of the members of SOFEM heard about the availability of funds at the DDC and in the meeting of SOFEM some board members proposed that SOFEM should apply for these funds so that the targeted population would benefit from the activities. But few of the board members showed interest and instead wanted to conduct research work and time and again make their visit to donor organizations to get funds for research work.

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Questions for discussion:

1. Looking through gender lens what can you find in this case study?
2. How do you see SOFEM from the perspective of community people?
3. How do you evaluate SOFEM in mobilization of internal, local, and external resources?
4. How do you see the future of SOFEM?
5. Do you see any interlink and consistency between their visions, mission, and plan?
6. If your organization were to be given a responsibility to enhance the performance, reputation, learning, and adaptation areas of SOFEM what would your organization suggest?
7. How would improved internal resource management help this organization?

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Reference #17: Basic Information Needs for Writing a Proposal

Before starting to write a proposal it is necessary to thoroughly consider the basic pieces of information that will be required. These basic elements will serve as the foundation for the contents of the proposal. Acquiring these basic pieces of information and organizing them into a comprehensive structure will help to ensure a good proposal. The basic pieces of information that are required to write a proposal include:

1. **Why**
 Why is the organization writing this proposal?
 Why is the problem or issue important to the organization?
 Is the problem or issue consistent with the mission and goals of the organization?
2. **What**
 What is the specific problem or issue that the organization wishes to address?
 What is the capacity of the organization to address the problem?
 Given its capacity, what activity or activities will the organization propose in order to address the problem or issue (e.g., training, technical assistance, research, etc.)?
 What results does the organization hope to achieve from the proposed activity?
3. **Who**
 Who are the intended beneficiaries of the proposed activity? How many will benefit?
4. **How**
 How will the organization achieve the desired results? Describe program/project implementation methodology, and the monitoring and evaluation plan
 How will gender be integrated?
5. **Where?**
 Where will the program/project/activity be located, and why was this location chosen?
6. **When?**
 When will the project be implemented. Determine and explain program/project timeframe. Describe and indicate sequence of events.
7. **How** **much?**
 Indicate the total program/project budget
 Include contribution of implementing agency.
8. **To** **Whom**
 To whom is the proposal directed (i.e., funding agency, etc.)
 Why does the organization believe this agency will contribute?

Reference #18: Organizing a Proposal

After acquiring the basic information to be included for a proposal, the proposal writer must organize it into an outline. The following table provides five proposal outline examples. These are taken from actual proposals.

Proposal Outline A	Proposal Outline B	Proposal Outline C	Proposal Outline D	Proposal Outline E
Title page	Executive Summary, (problems, solutions, funding needs, organization and expertise)	Abstract	Summary/Abstract	Cover Letter
Abstract				
Table of Contents	Statement of needs	Outline	Introduction Needs assessment	Needs/Statement of the problems.
Introduction Background section		Introduction, Problems, meeting needs		
Description of proposed research	Project description, (objectives, methods, staffing, administration)	Description of the project (objectives, clients, services, staff, volunteers).	Objectives, Activities, Facilities.	Objectives, Methods/Design
Description of institutional resources	Organization information	Staffing plan	Personnel	Project personnel
List of references				
Personnel section				
Budget section	Budget	Funds required, Funding sources	Budget	Budget
Appendices	Conclusion	Evaluation Plan	Evaluation	Evaluation List of attachments
		Anticipated impacts References, budget summary	Future funding Summary	

Reference #19: Sample Format of a Proposal

A good proposal should have a good structure. Following is a comprehensive example of proposal headings.

1. Cover

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The cover page of proposal should include:

- Name of the project
- Name of the submitting organization
- Name of the funding organization
- Duration of the project
- Date of proposal submitting date

2. Table

of

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The table of contents should include:

- Contents
- Page numbers

3. Summary of project proposal/Executive Summary

The summary of project proposal should not exceed more than two pages. It should be written carefully to create interest. It should include:

- Name of the project
- Goal and objectives (intended results)
- Budget
- Targeted groups and population
- Location of project
- Brief introduction and rationale of project
- How gender equality is addressed in the proposal

4. Introduction

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This section tries to establish that the organization is a *bonafide* organization, which is able to carry out the proposed project or activity. This section should include:

- Brief introduction or organization
- Date of establishment
- Goal and objectives of organization
- Legal status
- Working experience
- Major achievements
- Strengths of the organization

5. Background of project

This section describes how the project originated, and explains previous work done on the problem.

6. Statement of problems or needs that the project will address

7. The goal statement

8. Statement of project objectives/intended results

Explain the specific results that the project expects to achieve. These are the objectives of the project.

9. Statement of strategy

Provide a clear description of the overall methodology by which the results will be achieved.

10. Implementation plan

This section sets out the details of the project activities and how these will be coordinated for smooth implementation. It includes:

- Activities: these are specifically listed and explained
- Action plan: this will detail how each of the activities are going to achieve in a given timeframe.

11. Budgeting

Make a distinction between program and administrative budgets. The budget should be expressed in clear and logical categories

12. Monitoring and evaluation plan

The proposal should include a clear, but brief plan for collecting and analyzing information together with appropriate methodologies.

13. Conclusion

Stress and reinforce the merits of the proposal, and that the funds invested will be of value.

14. Appendices

Include any information that supports the proposal.