Skills building for mobilizing resources

Mobilizing resources is...

Making connections and building relationships (that may or may not result in funding)
The ABCDE of mobilizing resources

A Putting your ‘house’ in order
B Researching potential donors
C Making contact
D Managing the relationship
E Proposal writing
A: Putting your house in order

» A strategic plan with
  • a clear focus and unique positioning
  • inspiring goals and strategies
  • outcome orientation

» Due diligence and accountability mechanisms (governance, finance, legal)

» A case statement
  • People in the organization (all!?) who can make a clear and compelling case for the organization (in three minutes if you have to..!)
A case statement... should include the following elements:

» The problem we address is...
» The change we want to produce is... (refers to the actual program work)
» The most important difference in the world our work will make is... (refers to the greater social change)
» This is why your organization and mine are the perfect partners...
Audiences

» The president of Google.org (foundation)

» A high level officer of a European bilateral funder

» A 40+ year old high-net worth feminist
B: Researching potential donors

» Learn about them: websites, internet searches, newspapers, annual reports

» Find out about them from peer organizations (ask about their funders, look at their annual reports)

» Learn about the person behind the donor
C: Making contact

» The donor’s (unspoken) questions:
  - Who is contacting me?
  - How much do they want?
  - Why do they want it?
  - What will they do with the money?
  - How does this fit with our own priorities?
  - Do they have the capacity and track record?
  - Who in my network knows them? (our grantees, donor colleagues)
C: Making contact: do’s and dont’s (1)

» No cold calls/ info@bigfoundation.com

» Seek an introduction (via email or F2F)

» Answer the donor’s unspoken questions
   AND specific questions: find the FIT

» Keep it short, solicit interest
C: Making contact: do’s and don’ts (2)

» Don’t run down other organizations
» Don’t make claims you cannot substantiate
» Instead, inspire, offer an opportunity to make a difference
C: F2F contact (1)

» Homework
  - Research the person
  - Research the organization
  - Send the right representative
  - Be on time
C: F2F contact (2)

» The meeting:
  - Introduce yourself
  - Find out how much time you have
  - Ask questions and answer questions
  - “Make your case” (case statement)
  - Share your thinking about risks, challenges and problems as well as successes
  - Show leadership
  - Agree on next steps
  - If the answer is NO, be graceful (acknowledge why the donor can’t fund you)
  - Turn NO into a MAYBE later(?)
  - Ask for potential other donors
  - End on time
D: Managing the relationship

» Thank the donor within days after meeting (or receiving a grant)
» Create and update donor profiles, donor requirements
» Stick to promises, be timely
» Keep donor informed and ‘involved’
  ▪ Tie their interest to a recent success, to events and type of information (tailor-made versus standard); send invitations
» Acknowledge funders in your publications
E: Proposal writing

» [Oh, and then there is proposal writing...]

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