

Resource Mobilization, Grant Writing and Organizational Development for Small and Medium agencies and groups

On completion of the Workshop, the trainee and the institutions shall;

1. Have developed their own institutional resource mobilization and fundraising plan
2. Have developed at least 2 proposals or project concepts ready to submit for financing
3. Have a completed list of organizational policies
4. Subscribed and can receive regular funding, bidding, partnership and conference opportunities
5. Have their own strategic plan
6. Have developed an institutional business or enterprise to be able to generate income for the agency
7. Have developed a social media and on-line fundraising plan able to generate resources quickly.

The Training Agenda and Sessions

Topic One – Introduction to resource mobilization and fundraising

Session 1: Introduction to resource mobilization and fundraising

Time	Session Title	Session Abstract
1hr 0 minutes	Background information and Training Objectives	“Every agency, be it Government-owned, Non-profit or enterprises – in order to be sustainable, MUST earn income hence SHOULD OPERATE as a business!”. This is the philosophy on which our training program is built. This introductory session covers the Goals, Objectives and Training methodology.
1hr 30 minutes	Key principles in Resource Mobilization and Fundraising	Every activity your agency does is or affects Resource mobilization. Its possibly the single most cross-cutting facet as it touches communication, institutional image and credibility, leadership commitment, systems and tools, M&E and reporting among others. What goes into your mind when you receive a request to help, is what crosses every financiers’ minds too. So this session covers the key principles, tools and instruments in resource mobilization. We also discuss the 30 modern-day skills that a seasoned resource mobilizer should exhibit.
2hrs 30 minutes	Different strategies to Resource Mobilization for Grassroot agencies.	Strategies are based on the nature of financing one is targeting. We cover among others; grants/ proposal writing, events, auctions, provision of consultancy services, hire/ renting services, direct letters, internal savings, sale of items, business investments, membership and alumni, shares and savings etc

Topic Two – Types and Sources of financing for small Agencies and Groups

Session 2: **Types and Sources of financing for Grassroot Agencies**

1hrs 15 minutes	Types of financiers and the available sources of funding for Grassroot Groups.	Interestingly, everything can find a financier. The task is to find one. Good resource mobilizers might not be the best proposal writers but certainly <u>should know WHERE the funds for WHAT are and HOW to tap it.</u> The session explores the commonest sources and types of financiers. Each agency should develop and regularly update its list of potential financiers and strategy to reach them; Government, public projects and agencies, banks, Embassies, foundations, Corporates, intergovernmental agencies and others.
2hrs 15 minutes	Forms of financing for grassroot agencies and groups	It's one task to know the financier/ donor and totally another to know the strategy to approach them and how they finance. The session covers the different financing modalities agencies need to be aware of so as to integrate them in their plans/ strategies; Grants, Venture capital, Equity, Leases, Loans, Donations, Factoring, Revolving and start-up capital, Angel investors and many others including a blend.
1hrs 15 minutes	New areas attracting financing in the 21 st century	Agencies should balance between the “passion the Directors have to serve” and “what the current market offers”. If you largely rely on external financing, then you should “manufacture and sell” what the external market wants to buy. Keep on revising your Strategic Plan for relevancy to your financing sources. This session discusses the new trending areas commonest with financiers.

Topic Three – Writing Grant Proposals and Project Concepts

Session 3: **Writing Grant Proposals and Project concepts**

5hrs 15 minutes	Writing a competitive Grant Proposal. <i>“From ideation to proposal submission and follow-up”</i>	Grant proposals can be solicited or unsolicited. While many trainings concentrate on teaching trainees the different proposal sections (<i>yet majority of financiers have their detailed formats</i>), our trainings focus on 4 elements; a) Developing a fundable idea b) The skills of searching and securing the right financier/ funding opportunity for your project c) Understanding, interpreting and approaching a financing opportunity d) Skills of writing “financeable” proposals and concepts
	Practical Proposal writing sessions	Each trainee from the start, receives ACTIVE Request for Proposals or financing. These become the practicum areas for the trainee to work on and submit. The Trainees tasks always include; ❖ Developing the Goal, Hypothesis, Objectives and Inputs, Outputs, Strategies/ approaches and innovations, Activities, Partners/ collaborators, Outcomes and Impact and; ❖ Developing the project Monitoring and Evaluation framework.
3hrs 20 minutes	Developing concepts	Agencies must get used to writing concepts with or without a donor so that when an opportunity for financing comes, this concept can be used as a tool to engage the potential financiers/ Donors. The session takes trainees through formats of acceptable concepts and the use of concepts.

2hrs 15 minutes	Developing an unsolicited application grant	Unsolicited applications have gained popularity in recent times as several financiers rely on your personal interest and effort to access their services. We guide you on how this can be done.
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Topic Four - Budgets and Administrative Logistics

Session 4: Budgeting and administrative logistics

2hrs 30 minutes	Preparing a project/proposal Budgets	A budget is the “the proposal with financials” hence must rhyme well with the written content. A good budget has key characteristics. The training takes you through the basics of budgets and budgeting.
2hrs 30 minutes	Managing donor and 3 rd party Project Budgets	Many development agencies, and a good example are the US Federal Agencies – have developed standard and robust Grant Administrative Requirements to clearly spell out the <u>Cost Principles, and Audit Requirements among others</u> . If everyone managing external financing, whether from government or small agencies - mastered the four cost principles (allowability, allocability, reasonableness and consistency) then financial management, budget monitoring and compliance will be easy. This section covers the above areas including; accounting principles, preparation of Work Plans, budgets and cash flow management, interpreting information in contract and financial statements, compliance issues, costing factors, budget monitoring and management techniques, the compliance and regulatory and governance issues and risk management among others.
2hrs 30 minutes	Writing organizational documents including capability statements and profiles.	There are several instances when profiles or capability statements have been submitted as “proposals” to financiers. If you are given a chance to do one for your agency, write knowing that <u>“to some donors, that is all they may have time to read”</u> . So, when writing a capability statement, paint a picture of reliability, strength and trust. In it, mention, for example, the strong members you have on your board, Senior management or Staff. List other seemingly minor items as long as you believe can contribute <u>SIGNIFICANTLY</u> .
1hrs 15 minutes	Post-proposal submission and pre-grant award processes.	The process of proposal submission and immediately afterwards is very critical as it involves sensitive communication, due diligence, reference checks and others. This often calls for unique skills. The session brings out what usually takes place including the Dos and Donts.

Topic Five – Planning and conducting fundraising events

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1hrs 15 minutes	Developing and running fundraising events including appeals for emergency Projects?	Annual or quarterly events once well-crafted, are an assured source of funding for any agency. We guide you through the types of events and how your agency can successfully plan, initiate and conduct a bankable fundraising event.
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2hrs 30 minutes	50 Tips on how a small CSO/ Business can survive during times of lack or limited funding.	Every agency, regardless of its size, shall one time go through that period of “free fall” and uncertainty. You can avoid this by “managing the resources you have”. There are over 50 ways a small agency can manage to navigate through such hard-financial times. These are practical and could easily be adopted for effective results.
2hrs 30 minutes	Drawing a Resource Mobilization and Fundraising Strategy for your CSOs/ Enterprises.	Your agency- while looking for money - needs to guide its efforts, strategy and tactics, in the process of making frantic calls, writing concepts or attending donor events. In short, a fundraising plan must be developed to keep you focused and composed in “a mad environment of looking for resources”
2hrs 30 minutes	The things that the fundraising and Grants staff MUST never do!!!	<ul style="list-style-type: none"> ❖ It’s common in fundraising to be over ambitious. And often in your efforts to raise funds, one can unintentionally end up planning costly events or doing things that adversely affect your group. Some bombard donors with desperate mails which instead ends up harming your reputation. We discuss things NEVER to do!!! ❖ We also discuss “common project implementation pitfalls” and strategies to address them.

Topic Six– Online and Donor Registration Processes

Session 6: **Online and Donor Registration processes**

1hrs 10 minutes	How to register and be able to receive and apply for funding opportunities from US Federal Agencies. The session also covers EU Grant access requirements.	The US Government is the single leading and biggest financier especially in terms of Grants, unfortunately thousands of small, medium and big agencies, despite being eligible – are unaware of the grant processes, including <u>MANDATORY BUT FREE Registrations with SAM.gov and Grants.gov</u> to be able to do ANY business with the US Federal government. The trainees are supported to navigate through this process and GET REGISTERED
2hrs 15 minutes	The Grant applications & submissions processes to US Federal Agencies.	Unless indicated in a particular Funding Opportunity Announcement, all applications and submissions to US Federal Agencies (USAID, CDC, PEPFAR, NIH etc) are electronic (online). For effective learning, trainers use ACTIVE funding opportunities to guide the trainees through the process.
3hrs 15 minutes	The social media and Online Fundraising that small agencies can use for their publicity and fundraising needs	<p>One can safely now assert that “You cannot fundraise without the phone and internet”. Whether pledges, e-mails, proposals, events or publicity – you need to contact and reach a bigger number. So;</p> <ul style="list-style-type: none"> ❖ Online and Social Media publicity about one’s products and impact have become very popular. ❖ Applicants use You-tube to place proposals, or have opted for crowd funding platforms; DolphinFund, GoGetFunding Happy Funders, Friends-fund, Lupiiya, Akabbo, GoFundMe, Fundly, Donorbox and others ❖ E-commerce and trading options for Small Enterprises and businesses. ❖ Donor and online funding opportunity Databases; Bond, Grants.gov, FundsforNGOs, World YWCA and others.

Topic Seven – Online and Donor Registration Processes

Session 7: Developing Strategic and Business Plans for Grassroots agencies and SMEs

3hrs 30 minutes	Developing a Strategic Plan for small agencies and SMEs.	Small agencies are unable to effectively fundraise partly due to lack of forward looking and sustainable strategic plans. But others even complicate their situations through unnecessary big strategic plan documents. We advise short documents showing; Vision, Mission, Goal, Thematic areas, Objectives, Outcomes, Strategies/ approaches and activities. Strategic plans are “ Institutional travel maps ” so should be direct and less verbose.
3hrs 10 minutes	Developing Business and Investment Plans	Both startups and established agencies may need and use Business Plans for different reasons. Although many consultants chose to complicate these documents, its merely a road-map that guides firms from business selection, registration, marketing, financial, and operational standpoints. Ofcourse an agency can choose to have a Strategic or Business plan but possibly not the two. Fortunately, also having both is not that its unheard of.

Topic Eight – Project Management and Compliance issues

Session 8: Project management and compliance Issues

2hrs 30 minutes	Key tools and structures that drive institutional & governance capacity for small agencies & SMEs.	The capacity of small agencies to secure financing is hampered by their chronic lack of key structures, tools and systems – which many financiers together with their due diligence processes, often consider as mandatory. Areas concerning Governance, Administration, Human Resources, Financial Management, Knowledge Management and Program/project Management are critical for secure or manage financing.
1hr 30 minutes	The statutory and regulatory issues	Many countries struggle to institute and manage statutory processes for small and young enterprises. Its even harder if it concerns small Non-Profit Agencies. The training covers the basics that managers need to know especially dealing with Registration Boards, a Revenue Authority, a City Council, an NGO Bureau, a Social Security Fund or District Authority among others. These require or offer Registrations, Licenses, Certificates, Permits, Returns, Taxes etc. The training program explores and discusses these in details – to become compliant.
1hr 15 minutes	Project Management and reporting requirements	<ul style="list-style-type: none"> ❖ Trainees appreciate performance and financial reporting requirements for key grant-giving agencies. ❖ Trainees are able to answer the question “<i>How do we remain compliant while managing external funding?</i>”
2hrs 30 minutes	Preparing for an audit	Given their limited resources, small agencies do not consider auditing as a very important part of the business. In the process, they miss out on an array of opportunities that come with audits including; improving management processes, good governance, fundraising and strategic planning among others.

1hrs 15 minutes	How to develop a basic monitoring & evaluation plan for a small agency	Financiers normally support agencies that they are convinced shall achieve impact. Therefore, managers must ensure they set tracking and reporting guidelines to manage performance. This starts with having very clear project goal, objectives, activities, indicators of achievement and data collection and management plan.
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Post-Training Program

Post-Training Period (15 hrs)	The Resource Mobilization Mentorship Program	The post-training period comes with a lot of anxiety. Both the trainee and their institution want the funds to start “flowing quickly” and any delay is interpreted as failure – regardless of whether the host institution has put in place requirements “that oil” resource mobilization and fundraising. Our trainees can opt to register for a work-station tailored MENTORSHIP PROGRAM where one is attached to a specialist for a total period of 15hrs and in the process they receive practical guidance to ground the training to ones’ agency or context.
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