RESOURCEMOBILISATION

telecentre.org

A Guide to Resource Mobilisation Planning

for Partners of the Telecentre Women: Digital Literacy Campaign

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What is Resource Mobilisation?

Very often, we equate the term “resource mobilisation” with fund raising. Raising funds or money is only a part of resource mobilisation; in fact, it can be a target or an outcome of resource mobilisation efforts. Resource mobilisation goes beyond just dollars and cents. It includes building valuable contacts and networks, and garnering the interest, support, and in-kind contributions of people important to your organisation. Just as important as raising funds is the effort to building relationships. People don’t give money to causes, they give to people with causes.[1] So resource mobilisation goes beyond fund raising; it is friend raising as well[2].

Planning for Resource Mobilisation

Organisations should make adequate preparations for resource mobilisation to be effective and to ensure they are maximising all opportunities. An organisation’s resource mobilisation plan should be tightly integrated with their organisational strategic and communication plan. If an organisation is well-managed and conveys its key messages effectively to its target audiences, it will be more successful in raising resources, and this, in turn, will contribute to the organisation’s continued growth. Hence, the two strategic plans must go hand in hand. A resource mobilisation plan must follow closely the vision, mission, and goals of the organisation or be aligned with specific objectives for raising those resources.

Another reason why the resource mobilisation plan must be closely linked to the strategic plan of an organisation is that the management team must be fully involved in the resource mobilisation planning. Like marketing, it is a function that is not just left to the resource mobilisation team. All the different parts of the organisation must be aware of the objectives of the resource mobilisation plan and the role they plan in its execution. For example, the finance or accounting section of the organisation should and could participate in the resource mobilisation process by helping to construct the “fund raising needs statement”, which assesses the target resources to be raised, the organisation’s current financial situation and, based on that, the resource gap to be filled.

Your Resource Mobilisation Action Plan: Five Steps

STEP 1	Organisational Situational Analysis
STEP 2	Resource Mobilisation Environment Research and Donor Mapping
STEP 3	Constructing your Statement of Funding Needs
STEP 4	Prospecting and Communicating with Potential Donors/Contributors
STEP 5	Monitoring and Evaluating your Resource Mobilisation Efforts

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[1] *Resource Mobilization – A Practical Guide for Research and Community-Based Organizations*, Venture for Fund Raising, Philippines, 2009

ACTION PLAN | STEP 1 | Organisational Situational Analysis

The following analysis framework will help you align your resource mobilisation efforts for the Telecentre Women: Digital Literacy Campaign with your strategic plan, and to assess your readiness to embark on your resource mobilisation plan.

Brainstorm these questions within your organisation/team and summarise your answers according to this framework.

1. **Organisational/Team Structure**

   a. Do you have a team in place to carry out the work of the Campaign?
   b. Are the team members clear about their individual roles in the Campaign?
   c. Is there someone appointed as the lead or focal point for the Campaign?

2. **Vision, Mission, Goals**

Please review the brief of the Telecentre Women: Digital Literacy Campaign.

   a. Are you and your team clear about the vision, mission, and goals of the Campaign?
   b. Are you and your team able to communicate these vision, mission, and goals briefly and quickly?
   c. Are you able to prepare a 1-2 page summary to be handed out should you meet with a potential contributor/ donor to the Campaign?

3. **Strengths, Weaknesses, Opportunities, Threats (SWOT)**

Many organisations may already have done a SWOT analysis in the course of their organisational strategic planning. The purpose of this SWOT analysis is not to duplicate what you already have, but to think of your strengths, weaknesses, opportunities, and threats *from the specific angle of resource mobilisation*. Remember that strengths and weaknesses are internal to your organisation and can be managed and controlled by you, while threats and opportunities are external factors.

   a. What are your strengths to help you mobilise resources for the Campaign?
      - Examples could be: experienced and enthusiastic team members; good governance; good reputation; wide network contacts; good existing relationships with stakeholders and donors, etc.
   b. What are your weaknesses that may be need strengthening in order for you to carry out resource mobilisation for the Campaign?
      - Examples are unclear roles of team members; lack of skills, experience, and/or training; lack of will or proper scheduling of time or resources to carry out these activities.
   c. What are the opportunities for you to carry out resource mobilisation activities?
      - Is there a general awareness and support for telecentres in your country from government?
      - Is there an increasing trend to support the area of women, ICT skills development, and entrepreneurship skills?
      - Is this support coming from government or private sector or both?
      - Are there women's movements or networks in your country that you could link up with to synergise your efforts?
      - Are there private sector groups that would support the Campaign?
      - Are there potential stakeholder groups that you have not explored in the past?
      - Is there a growing demand for the services you are offering?
   d. What are the threats which you may face in carrying out resource mobilisation activities?
      - Are the economic, political, and social environments conducive for your activities?
      - Are donors still enthusiastic in supporting your area of work or are the trends towards funding gender and women's issues decreasing?
      - Is there intense competition for donor or private sector funding in your environment?

Summarise your answers to the SWOT analysis in the following matrix:

Tool 1: SWOT for Resource Mobilisation

INTERNAL	Strengths	Opportunities	EXTERNAL
	Weaknesses	Threats	

What does the above analysis tell you about:

1. Your organisation/team's readiness and capacity to mobilise resources?
2. The factors in your organisation's internal and external environment that would have an impact on your ability to mobilise resources for the Campaign?

Please also consider:

3. How would you act to harness your strengths to take advantage of the opportunities and to overcome the perceived threats?
4. How would you deal with the weaknesses identified through this SWOT?

ACTION PLAN	STEP 2	Resource Mobilisation Environment Research and Donor Mapping

Congratulations! If you are reading these notes, you must have completed the first step in resource mobilisation: clarifying your vision, mission, and goals of the Campaign, knowing your team's roles and capacity, and analysing your strengths, weaknesses, opportunities, and threats to carry out our resource mobilisation efforts for the Campaign.

Now we turn to the external environment where your resource mobilisation targets lie. It is common for organisations to be spontaneous and opportunistic in their approach to seeking donors/investors, rather than adopting a systematic, targeted approach. Being opportunistic has its values and certainly works when you meet the right donor at the right time and place. But a planned approach may yield results over a more sustained period of time and help you assess which strategies work better and where to concentrate your efforts.

Therefore, you may find it worthwhile to spend some time to first scan your funding environment for two key purposes: (1) to understand the current trends for supporting your cause, and (2) to construct a ***donor's map*** so that you can see where your current donors are concentrated and where you should continue your existing and future efforts.

Understanding Trends for Support

Understanding which specific areas policymakers or donors are concerned with, and why, will help you prepare your approach better. In some countries, issues such as women and gender equality may no longer be high on the donors' agenda. Instead, there may be a push for supporting entrepreneurship. Thus, in relation to the Telecentre Women's Campaign, you'll need to understand what is the current trend for supporting the range of activities and products which the Campaign aims to deliver - such as promotion of women entrepreneurs, ICT education in general, and women's training specifically. Is there increasing support or is there a decline? Which specific areas seem to be of concern to policymakers and donors and why?

I'll give you the example of Singapore, where I live. Although it is one of the countries in Asia with a high level of ICT access and usage (about 83% of households have access to computers and the Internet and 69% of all businesses have broadband), there are still pockets of society that are being left behind in the Internet age. The government is very concerned about addressing the needs of those not catching up with the digital age, and has targeted three areas for special attention: engaging the elderly (aged 65 and above); nurturing needy students; and empowering the disabled. By doing so, the government hopes to improve the social inclusion of all groups.

As part of its strategy to reach the above pockets of society, the government is partnering with private enterprise. Educational institutions, ICT vendors, and businesses are contributing to these outreach efforts in the form of public-private endeavours. To engage the elderly, the government provides training subsidies for basic computer literacy courses to be run by schools and IT vendors which have the equipment and training facilities. Are there similar opportunities for engaging such training partners in your country?

Donor Research and Mapping

As a first step in trying to mobilise resources for the Telecentre Women: Digital Literacy Campaign, try to identify and list down the key descriptors for your cause, to help you conduct your research, especially if you are doing an online search. Words that immediately come to mind are:

- Women
- Education
- Information and communication technologies
- Computer skills training
- ICT skills training
- Entrepreneurship

You may be able to add more to this list based on your own local situation.

Using these key words, you may then search for donors, contributors, or investors involved in related causes. There are some key categories of funding sources, many of which you may already be familiar with, with suggestions for your further exploration.

<u>International Donors</u>

- Doing a Web search for each of the donors in your country or region is easy these days, but the list takes time to compile. Moreover, changes in funding priorities are not always reflected on the donor's website in a timely manner. Donors may also have their own specific funding policies which do not quite fit with your needs.
- One effective way of tapping international donors might be to participate in donor roundtables for NGOs in your country where you will be able to hear donors speak about their own current funding interests and be able to interact with them personally. (Of course, going there means you need to be prepared to present your own cause clearly – refer to Action Plan Step I).
- You may also like to explore the relatively smaller funding available out of the development counsellor's budgets in the respective Embassies. These are usually easier to tap for straightforward funding such as training courses, conferences, or seminars.

<u>National/Local Government</u>

- Special agencies such as the InfoComm Development Authority or National Computer Board may have national or local plans for upgrading ICT skills of the population or may target certain groups.
- Other parts of government, for example, the Ministry for Women or the Ministry of Trade and Industry may also have programmes that could be potentially tapped by the Telecentre Women Campaign, as the Campaign is not only about ICT skills, but also entrepreneurship and trade.
- The Ministry of Education would be interested in the area of adult education and new ways of delivering education online.
- Telecentre managers may present the telecentre not just as a training centre but as a hub where the community comes together to learn as well contribute ideas and feedback to policy-makers. Governments would be more interested in supporting you if you can help them achieve their goals of community-bonding and citizenry engagement on government policies.

<u>Private Foundations/Philanthropic Organisations</u>

- I'm sure you are familiar with the key private foundations and philanthropic organisations in your own country and local community but there are bound to be many smaller ones that are not very high profile and deserve to be explored.
- As local businesses thrive, their owners are giving more back to society. You need to research who they are and match their goals with yours.
- Education is a popular area which tends to draw philanthropists as they consider themselves as investing in the future. Telecentre Women could pitch themselves as catalysts for improving the future generation through education.

Business Community

- The business community may be closely linked with the private foundations and philanthropic organizations as they may be the ones to set up those private foundations (Microsoft, Gates, Hewlett Foundation, etc).
- Apart from their philanthropic arms, corporations, especially those with global outreach, very often have projects which may pose as good potential for the Telecentre Women Campaign. For example, a multi-national company in your country may wish to adopt a telecentre for its staff to do volunteer work with or may wish to donate to in cash and in-kind.
- In the March e-Newsletter of the Asian Philanthropy Forum, the forecast is that US-based foundations may increase their international giving as the businesses to which they are linked expand their markets overseas. Very often, they would choose to give back to the communities where such overseas bases are set up.
- Companies that are actively engaged in corporate social responsibility may also be good potential partners or contributors.

Individuals

- Individuals with the capacity as well as care and concern for your cause would be great allies. Try and identify community or business leaders who could be your spokespersons or champions.
- Other individuals from the community may also work for your Campaign as long as they understand and share your vision and mission. For example, a successful corporate woman from Singapore who was tired of corporate life, decided to help Cambodian NGO train victims of sex slavery learn new skills to give them a new “liveable future” after learning of their plight. See this for more details.

Others

- Women’s and civic organisations or associations that promote gender equality as well as those concerned with promoting women’s entrepreneurship share the same goals as the Telecentre Women’s Campaign and could be potential partners for joint programmes.
- An example is a group of American women calling themselves “Friends of Cambodia” helping Cambodian women to market and sell their weaving and arts and crafts on the web, something that the Cambodian women would never have been able to do on their own.

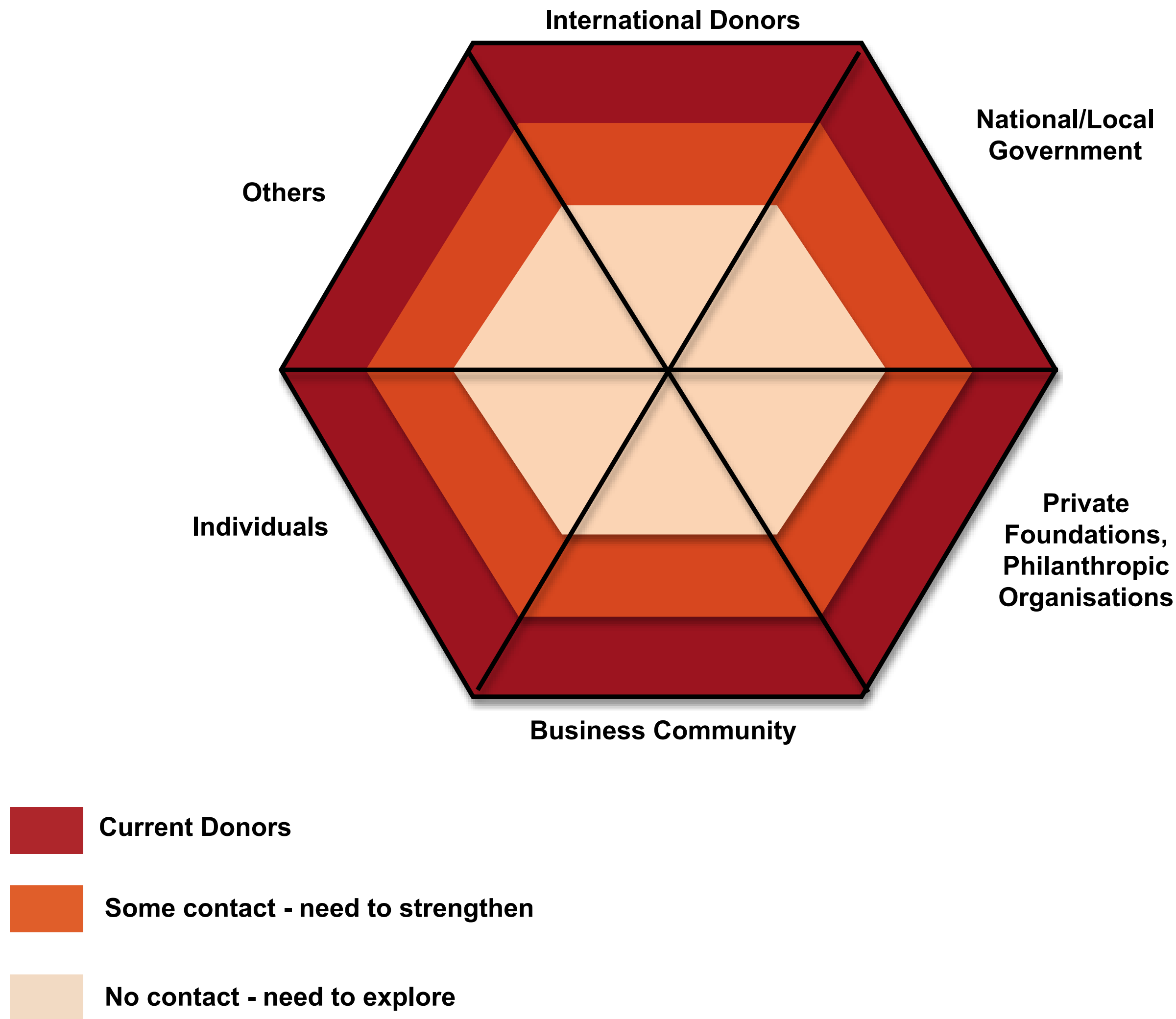
Try to construct your own **Donor’s Map** (see framework on the next page) by plotting your: (1) current donors/partners, (2) those whom you have some contact with but do not yet have a strong relationship, and (3) those that are out of your radar screen now and need to be brought into your Map for further exploration.

What does this mapping exercise tell you? Consider and analyse the following:

- Where are the majority of your current donors/contributors/partners situated? What do you need to do to maintain their interest in you?
- Which category of donors/contributors/partners need to be strengthened? What do you need to do to strengthen their interest in you?
- Which part of the map is blank? This means you have not explored this category yet. How do you plan to fill this gap in future?

Your completed Donor’s Map will hopefully affirm which areas you are already doing well in and guide you to choose where to concentrate your future resource mobilisation efforts.

Tool 2: Donor Mapping



ACTION PLAN	STEP 3	Constructing your Statement of Funding Needs

As you have completed your internal and external analysis for resource mobilisation, you are now ready to approach donors or contributors. But before you do so, it is desirable that you have some clear targets in mind of how much you would need to raise, when, and from which types of sources. If you do not do this, you will be approaching donors in an unprepared manner and may not reach your optimum goals. Or, worse still, you may be seeking resources only when you discover you are running out of funds, which may be too late.

Venture for Fundraising, a Philippine-based consultancy firm, in their publication, *Resource Mobilization – A Practical Guide for Research and Community-Based Organizations*, rightly points out that a scenario common to many research-based institutions is that they are "fund-driven", i.e. a programme or project exists only when there's funding for it, and less because there is a real and important need for it.

As a telecentre.org partner, are you planning to embark on the Telecentre Women: Digital Literacy Campaign? Assuming you have completed the first two action steps for resource mobilisation as discussed in our previous Forums, you have come to the next step (Step No. 3) in developing your Resource Mobilisation Action Plan. To recapitulate, the first two action steps were:

1. **Organisational Situational Analysis:** Ensuring your organisational/team structure for the Campaign is in place; clarifying your vision, mission, goals, and doing a SWOT analysis to assess your readiness to carry out resource mobilisation;

2. **Donor Research and Mapping:** Understanding the types and motivations of donors who would support your Campaign and what your own donor's map looks like.

Please revisit the previous Forums if you have not done so, before proceeding to the next step in your Resource Mobilisation Plan below.

Constructing your Statement of Funding Needs and Resource Timeline

Some of the key components and considerations for constructing this Statement of Funding Needs include:

- A realistic review of your current resource situation (what you are able to expend for the Campaign from your existing resources)
- The target amount for the activities you are planning to raise funds for (a detailed budget the Campaign's programme of activities will yield this information)
- The resource timeline (i.e. over what period of time is the funding required).

Use the following tool to help you construct this Statement of Fund Needs and Resource Timeline. It will show at a glance your current resource situation; your funding needs throughout the period of your Campaign activity; and the funding gaps or resource needs which are to be met through resource mobilisation efforts.

Points to ponder to help you with your planning:

- What does the Statement of Funding Needs and Resource Timeline tell you about your capacity to carry out the planned activity?
- How will you prioritise your resource mobilisation efforts to achieve what you plan to do?

Tool 3: Statement of Funding Needs and Resource Timeline

1. Activity/ Programme	2. Resources		3. Resource Gaps/ Funding Needs	4. Resource Providers	5. Timeline			6. Notes/ Remarks
	2a. Required	2b. Available			Yr 1	Yr 2	Yr 3	
				Total Resource Mobilisation Target				

Source: *Resource Mobilization: A Practical Guide for Research and Community-Based Organizations*, Venture for Fund Raising, Philippines, 2009

1. **Activity/Programme.** List down the programme or activities you are implementing at present or are intending to pursue over the next three years

2a. **Resources Required.** Indicate the total amounts of funding and resource needs of your activities/ programmes based on your budgets for these activities.

2b. **Resources Available.** Indicate the amounts of funds or in-kind resources that already exist within your organisation to carry out the activities you have listed. It is advisable for you to consult your finance or accounting colleagues to help you with realistic figures. Remember, resource mobilisation involves the whole organisation.

3. **Resource Gaps/Funding Needs.** Obviously this column will show you the variance between Columns 2a and 2b. This column, together with the resource timeline, will help you determine how much you will need to mobilise resources, for whom, and when.

4. **Resource Providers.** Match your funding needs with the names of potential resource providers from your donor's map to help you plan your resource mobilisation efforts.

5. **Timeline.** Plot your funding needs according to your time schedule, to show you what amounts of funding is required when.

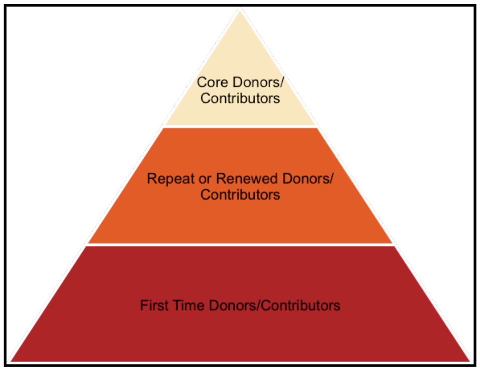
6. **Notes/Remarks.** Take note of how some of the funds are to be classified and expended; for example, some donors may restrict certain funds to be tied for certain activities only.

You have gone through Steps 1 to 3 preparing for resource mobilisation. Now it's time to go out to do your explorations and prospecting of potential donors. As a result of Steps 1 to 3, you should already be equipped with the following:

1. A brief 1-2 page Summary about your organization, your team, and your mission and plans for carrying out the Telecentre Women Digital Literacy Campaign (or any other project you are seeking funding for);
2. Your Donors Map, indicating who you could and should approach; and
3. Your Statement of Funding Needs and Resource timeline, indicating what kind of resources you need, how much, and when.

Selecting the Right Strategy Mix for Resource Mobilisation

Telecentres, like most community-based organizations, will likely to be funded by a variety of sources, but generally, the Pareto Principle may apply, that is, 80% of the funding may come from 20% of your donors/contributors.



Therefore, in the Resource Mobilisation Pyramid of Donors (shown left), the base of the pyramid (first level) is made up of first time donors/ contributors, followed by the next level, which are repeat or renewed donors/contributors, and then the top level, consisting of your core funders.

Venture for Fund Raising, in their publication[3], advocates that there are two major resource strategies needed to be applied to the Donors Pyramid:

1. Acquisition strategies – to bring in first-time donors/contributors by raising awareness about your organization and cause;
2. Nurturing or cultivating strategies – to maintain "upgrade" existing donors/contributors to the next level in the Donors' Pyramid or to contribute more.

Acquisition strategies may include direct mailing of your brochures or materials to those in the outer rings of your Donors' Map, inviting them to attend your events, or simply going to see them. These are generally people with whom you have had little or no contact but whom you have identified in your Donors' Map as potentially interested parties. Also in this category are your clients who come to avail of your services and contribute to your earned income. At the same, they may also include first time volunteers or supporters – remember, resource mobilisation is not only fund-raising but friend-raising as well.

In order to upgrade your existing donors to the next level of the Pyramid, or to increase their level of contribution, you need to have nurturing or cultivating strategies. The objective is to keep engaging them by developing partnerships with them, or exploring new ways to secure their long-term interest in contributing to your cause. Examples of those in this category include international granting agencies, government agencies, private foundations, or individual philanthropists. The key to this is to find out what they are looking for in the relationship and what you can offer them to satisfy their needs. Fund-raising and friend-raising is a two-way process. You are merely working out a common ground in which both parties can achieve their own goals. Some of the key activities for this strategy include participation in grants competitions, visiting donors or inviting them to your organisation or events and keeping them informed of your progress through online and print media.

Being able to select the right mix of strategies and relevant activities to engage with your new and existing donors/ contributors comes with from your resource mobilisation planning process.

Developing your Case Statement

After you have determined your target audiences to approach, you need to have a simple and effective way of communicating your cause to them – in the form of a case statement. The case statement should be simply worded, devoid of jargon, and appeal to a wide range of your stakeholders.

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[3] *Resource Mobilization – A Practical Guide for Research and Community-Based Organizations*, Venture for Fund Raising, Philippines, 2009

It should be understood and used by all levels of staff in your organisation and in all your communications with your donors/contributors. It should tell them these five key elements[4]:

1. **What is the need?** Try to make this need manageable and quantifiable so that potential donors feel they can make a difference. For example, one of the needs of your Campaign might be to train 2000 women in a year in your community to achieve basic computing literacy. This seems manageable.
2. **Where is the evidence that this is a pressing need?** Include results of surveys or statements of people in authority to emphasise why it is important to address this need.
3. **Why and how is your organization uniquely qualified to address this need?** You need to show the potential donor/contributor what is special about your organisation or approach. In other words, why should they fund you and not others.
4. **What are the benefits of your action?** What can you quantify as tangible results of your cause, and what are the possible other benefits? For example, 2,000 women who have gained computer literacy would be able to find employment more easily. In turn, their employment would bring about increased household income and improved livelihoods. Children would also benefit from mothers who have computer literacy.
5. **What are the negative impacts if you fail to address the need?** Sometimes this may be the strongest motivation for the potential donor/contributor, to see the negative impacts if you don't take action.

The case statement should be consistently articulated in all your communication material and your staff should be able to verbalise it when they meet with potential donors/contributors.

Meeting Your Prospective Donor Face-to-Face

After much hard work in contacting donors, you are finally invited by a prospective donor to meet. How should you prepare for the meeting so that you can maximise the opportunity and gain positive results from it?

After conducting a number of training sessions on this subject, I have collected a list of tips that may be helpful to you for your own preparation.

Before the meeting:

- Do prior research on the name, position, and area of responsibility of the person/team you are going to meet;
- Pack supporting materials that are directly relevant to your meeting, especially your business card;
- Have an extra copy of latest correspondence between you, including the proposal document that you may have already sent (do not assume the propspective donor will have everything in front of him/her or at his/her fingertips);
- If you are going to the meeting as a team, first determine who will be the spokesperson, and the rest of the team should ensure he/she is allowed to lead the conversation without being interrupted or contradicted by other team members;
- Practise your pitch (case statement) beforehand so that you are all on the same page.

During the meeting:

- Give the card – get the card! Present your business card immediately after the introduction, to help the prospective donor remember your affiliation (as they usually see too many people in a given day);
- State the purpose of your visit clearly at the outset;
- Introduce your team members with a very brief mention of the role each member plays in your cause;
- Build rapport early on by mentioning any previous meetings or links to the prospective donor's organisation;
- Propose how you think the prospective donor's organisation can contribute to your cause;
- Listen actively to the donor even though he/she may not share your same passion or interest in the subject and may talk about something else; in the course of his/her meanderings the prospective donor may be offering useful referrals to colleagues/people who do share your interest;
- If the prospective donor asks if you can do something he/she is interested in but it is not within your area of interest, do not say no immediately, but ask for time to consider it (this would give you opportunity to stay in touch);
- When the meeting is about to close, walk the prospective donor quickly through the material you have brought, pointing out any highlights, so that he/she would at least have some familiarity with it and be more inclined to look through it afterwards;
- At the close of the meeting, if the prospective donor does not mention next steps, please summarise what you have discussed and the follow-up action required;
- Lastly, if the prospective donor offers you refreshments, do not refuse it, thinking that you should be economical with time and get down to business quickly. By offering you refreshments, the prospective donor is indicating he/she has a bit of time to carry on a social conversation with you. Remember, fund-raising is friend-raising!

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[4] *The Influential Fundraiser*, Bernard Ross & Clare Segal, Jossey-Bass, 2009

After the meeting:

- Send an email the next day, thanking the donor and mentioning any follow up action;
- Follow up after a week or at an appropriate time based on the follow up action agreed upon;
- Do not immediately put the donor onto your mailing list to bombard him/her with e-newsletters; send a personal note first with your e-newsletter, linking any information in it to your area of discussions or proposal if applicable. Do not assume that everyone will have the same level of interest as you in your work. If there is no link or area of interest for him/her, he/she will just treat the e-newsletter as spam and discard all future mailings. Worse still, it may cause the prospective donor to form a poor impression of you and your organisation.

Points to Ponder:

1. Do you have a case statement for the Telecentre Women: Digital Literacy Campaign?
2. Does it contain the five key elements described above?
3. How prepared are you if you were invited to meet with a prospective donor tomorrow?
4. Do you have any lessons learned from your previous donor visits?

ACTION PLAN	STEP 5	Monitoring and Evaluating your Resource Mobilisation Efforts

Why Do We Need to Monitor and Evaluate?

At some point in your resource mobilisation efforts, you will want to ask yourself these questions: How are we doing? Have we reached our targets? What can we do better to reach our targets? Although this topic of monitoring and evaluation is discussed here as Step 5, you should be keeping this in view very early on in your resource mobilisation planning. But one must also bear in mind that you will need to have gained some experience in implementing your resource mobilisation plan before you have a better feel of what needs to be monitored and evaluated and when.

It is important to note that you are not only evaluating the monetary results of your efforts. There are other aspects to consider – such as your efficiency (return on investment) and also effectiveness in raising awareness and building and maintaining relationships. The latter is less tangible and harder to measure in the short-term.

Having a monitoring and evaluation framework within your Resource Mobilisation Plan will alert you to early signs of any problems such as overspending or under-budgeting for resource mobilisation efforts, or pursuing an activity that is not giving you any returns.[5]

Developing your Monitoring and Evaluation Framework – 4 Key Elements

Venture for Fund Raising suggests that there are 4 key elements to be addressed in developing your monitoring and evaluation:

Determine what you wish to monitor: Link performance indicators to your goals, so that you will see clearly if you are reaching your goals. For example, if your goal is to raise X dollars for a specific programme or activity in the Campaign, your performance indicator would simply be an assessment of whether you achieved the financial target you set.

Determine when you will monitor: This will depend on the timing set for the indicator and the duration you set to achieve the goal or complete the process.

Determine how you will monitor and who will do it: Make sure there are people allocated early in the process to do the monitoring and evaluation reporting so that they can start their observation and monitoring from the beginning of the process, not at the end of it. Also consider what your sources of information will be and how to get them (for example through surveys, interviews, financial reports).

Make sure monitoring is carried out and the results communicated: Although you may find it a challenge to do both implementation and monitoring at the same time, being able to use the results of the monitoring to improve your future operations will make it worthwhile. It is also important to share the monitoring results with your staff and stakeholders so they will understand and participate in the process.

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[5] *Resource Mobilization – A Practical Guide for Research and Community-Based Organizations*, Venture for Fund Raising, Philippines, 2009

Performance Indicators

Because resource mobilisation is not only about fund-raising but also friend-raising, you would need to measure your performance in both financial and non-financial factors. Some of these are listed in Venture for Fund Raising's Guide, page 103.

- **Return on Investment**: How much money was actually raised as income for any given activity in proportion to your expenses (see sample monitoring tool below);
- **Acquisition Cost**: How much money was spent on acquiring a new donor or the cost per dollar raised from the donor;
- **Response Rate**: What percentage of your mailout or outreach responded? This would provide feedback on the quality of your database;
- **Average Donation:** This may provide a guide as to how much your donors are generally willing to give to support your work and whether your current level of donors will be able to sustain your needs;
- **Attrition Rate:** This assessment would apply to both volunteers (your valuable in-kind resources) as well as donors (your valuable cash resources). You should regularly assess the joining and attrition rate of your volunteers so that if the rate becomes too high, you may wish to look at your organisaton's overall performance, and not just the resource mobilisation part. Similarly, in the case of donors, you should monitor their response rate and turnaround response time, their conversion rate (as a renewed or repeat donor) and attrition rate (obviously, if too many donors are falling your list, you need to take note!).

Donor Relations Audit

A donor relations audit is a review from time to time to help your organization understand what your donors or stakeholders think of you and to also validate your own assessment of the donor relationship. Such an audit could be carried out through document review, observation, surveys, interviews or focus group discussions. (See audit tool details below.)

When carrying out monitoring and evaluation of your resource mobilisation efforts, ensure that you focus not only the results or ends, but that you also focus on the means and understand and document the lessons learned so that you can improve your resource mobilisation planning and implementation.[6]

Tool 4: Sample Monitoring Tool for Budget Variances and Return on Investment for a Special Event[7]

Source	Targeted Gross Income	Actual Gross Income	Variance	Budgeted Expenses	Actual Expenses	Variance
Registration Fees	$700	$528				
Raffle Tickets	$500	$465				
Sponsorships	$1500	$2200				
In-kind donations	$2700	$1080				
TOTAL	$5400	$4273	**-21%**	**$3468**	**$2200**	**-36%**

Note: A ***variance*** is the difference between the expected amount and actual amount, expressed as a percentage of the expected amount. A positive indicates the variance is over the expected amount; a negative number indicates that it is under the expected amount.

[6] *Donor Management System: A Guide for Non-Profit Organisations*, National Volunteer and Philanthropy Centre, Singapore, 2008

[7] *Resource Mobilization – A Practical Guide for Research and Community-Based Organizations*, Venture for Fund Raising, Philippines, 2009, p107

Return on Investment (ROI)
Actual Gross Income over Actual Expenses
$4273/$2220 = 1.9

Targeted Net Income
Target Gross Income less Budgeted Expenses
$5400 - $3468 = $1932

Variance +6%

Actual Net Income
Actual Gross Income less Actual Expenses
$4273 - $2220 = $2053

Analysis:

In the hypothetical example of a special event above, was the event considered successful, or unsuccessful? It depends on the measures you use. Even with a variety of income sources, this event didn't meet its targeted gross income, grossing 21% less than the target. Yet not only did it register a positive ROI, even more important, it exceeded its net income target by 6%. The event was able to achieve that by keeping expenses low. In fact, actual expenses turned out to be 36% less than the budgeted amount. On the other hand, keep in mind that regularly over- or underestimating budgets by very large variances is not a good management practice.

Tool 5: Donor Relations Audit

The National Volunteer and Philanthropy Centre of Singapore, in their publication on donor management[8], suggests that there are several ways to carry out a donor relations audit.

Evaluation Method	Action
Document Review	Gather information from pre-existing materials
Observation	Gather information on how the donor management framework operates and document visual changes that have resulted
Survey	Get information from individual donors about their knowledge, attitude, and behaviour towards the organisation and its cause.
Interview	Obtain information from individual donors and supporters about their experience or to learn more about their answers to surveys
Focus group discussion	Hold discussions with groups of people to understand in depth what they believe is their relationship with the organisation and how they see the relationship going forward.

Questions which may be asked in a donor relations audit include:

1. How effectively did we communicate our needs and understand donor interests before asking for donations or support?
2. Did we provide the information you needed to make a decision on making a donation or giving support?
3. How satisfied are you with the way we asked for donations or support?
4. How satisfied are you (as a donor) with your ability to designate what your donation/contribution is to be used for? How assured are you that we will use your contribution according to your intent?

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[8] *Donor Management System: A Guide for Non-Profit Organisations*, National Volunteer and Philanthropy Centre, Singapore, 2008

5. How satisfied are you with the recognition you receive for being a donor?
6. Did we listen to your opinions and ideas?
7. How satisfied are you with the relationship between our organisation and yourself as a donor?
8. How often are you given an opportunity to visit/experience the work done through our organisation?

CONCLUSION	What Have We Learned from this Pilot?

The contents of this guide were shared with four telecentre.org network partners to help them with their respective resource mobilisation planning for the Campaign. Each partner went about the process in their own way and pace.

Here are a few pointers of what we've observed over the course of the last few months:

1. ***Time and Timing***: With all good intentions, we may assign a particular time or duration to devote to resource mobilisation efforts. However, it is not always easy to keep to such scheduling plans since the team or organisation is also struggling with many other priorities. Unexpected circumstances, such as changes in the organisation or team, or other more external pressing matters, could mean delays. An adequate buffer needs to be built in early into resource mobilisation planning to allow for re-scheduling if and when that is required.

2. ***Commitment and integration:*** Enthusiasm at the start of the resource mobilisation project may quickly fade with time, especially if other matters keep cropping up as described above and there is insufficient commitment from the team. Besides time management, the team's leaders must also ensure that the commitment level and motivation to carry on is sustained. One way to do this might be to integrate the resource mobilisation process within the other strategic functions and not to do it in isolation. The recommended approach of closely linking resource mobilisation with the strategic management of the organisation confirms that this is the right way to go.

3. ***Need and relevance:*** In some cases, resource mobilisation is less urgent than for others. Hence, a state of inertia remains, especially when the organisation feels it has sufficient resources to carry on doing what it has been doing and thinks resource mobilisation is not a relevant topic to them. However, at some stage, the funds will be depleted and if the organisation starts acting only then, it may be too late. Advance planning and prospecting for new funding opportunities will place the organisation one step ahead of others in the game. Having new targets would also keep team members on their toes and prevent them from being lulled into complacency.

4. ***Documenting it:*** The SWOT analysis and documenting what this means seems to be the hardest part for some. Some teams think the SWOT is a given as they already know their strengths and weaknesses. However, what these mean for resource mobilisation needs to be further examined. It is very tempting for teams to simply forge ahead with their action without spending time to assess their readiness. Documenting their analysis helps everyone (including those who join the organisation or team later) to be more aware of their current situation, and in the process they may discover more new ideas.

5. ***Finally, it's not a linear process***: Although the 5 steps of resource mobilisation were presented in a linear or sequential manner in this guide, it is true that resource mobilisation is not a linear process. However, it is probably a good idea to be familiar with all five steps in the process so that you can act with flexibility and confidence during any stage of the process. An opportunity to meet a donor may come along tomorrow. Are you prepared?