Mapping and Mobilizing Resources

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**“A VISION WITHOUT A PLAN IS JUST A DREAM.
A PLAN WITHOUT A VISION IS JUST DRUDGERY.
BUT A VISION WITH A PLAN CAN CHANGE THE WORLD.”**

– Proverb

PART TWO

Resource Mapping and Mobilization

TOTAL TIME

4 hours

AGENDA

2.1 Defining resource mobilization (30 minutes)

2.2 Introducing resource mapping and the funding landscape (30 minutes)

2.3 Setting resource mobilization targets (30 minutes)

2.4 Mapping:
- **a.** Individuals (30 minutes)
- **b.** Donors (30 minutes)

2.5 Conducting gap analysis (30 minutes)

2.6 Filling information gaps:
- **a.** Researching donors (20 minutes)
- **b.** Preparing for an informational interview (30 minutes)

FACILITATOR'S NOTE

This workshop offers approaches and tools to help identify potential donors and funding partners. For guidance on how to start a dialogue with them, see Module 3–the elevator pitch or speech.

If sessions are presented as stand-alone workshops, see "Getting Started" at the beginning of the guide.

Introduction

There is a saying, "If you want to catch fish, fish where the fish are." Yet, as creatures of habit, we are likely to fish in the same pond day after day, even after we've come up empty. This is an example of a common resource mobilization strategy—looking for donors in the places that are most comfortable. How do you find new, good places to fish? You probably ask friends or family (referrals) and you look at a map. The same is true for resource mobilization.

Every country and community has its own landscape of potential funders, influential persons and institutions. To help you identify or map these prospective donors, during the following modules you will:
- Rethink resource mobilization roles and responsibilities
- Map current and prospective funding resources
- Determine gaps in organizational linkages and awareness
- Practice ways to gather additional information

Resource mapping and mobilization, like networking, are iterative processes, meaning that you will repeat various steps to gradually build your understanding of the donor community and the larger funding landscape.

The modules begin by defining a few terms then, take you through the process of mapping your current and prospective resources, determining where you need to focus further effort, and exploring ways to build your network.

ATTENTION

The exercises in this module are designed to build on one another. So, it is best if they are completed in the order presented.

Handouts are provided at the end of the module.

MODULE 2.1

What is Resource Mobilization?

ABOUT THIS ACTIVITY

TIME

30 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ describe the difference between fundraising and resource mobilization, and
- ✔ identify resource mobilization roles and responsibilities for all staff members.

MATERIALS

- ☐ Flipchart, markers, and tape
- ☐ Handouts—*Resource Mobilization: Roles and Responsibilities Exercise; Resource Mobilization: Who Does It and How*

FACILITATOR'S NOTE

Participants may be familiar with each of the key terms but they may not share a common understanding. Defining terms as a group from the start helps everyone approach the material with a shared set of expectations and realize that resource mobilization is not just about money.

Throughout the session, write definitions of key words on flipchart paper and post as a ready reference.

Say: How does your organization support its work? Raise your hand if you rely on only one donor? Two? Three? Four or more? If those donors change their focus, are you ready, willing and able to adapt and explore new sources of support?

That is what we will examine together—ways to identify and pursue a healthy mix of resources that will enable your organization to weather (or adapt to) changes in the funding landscape.

Ask: What exactly are resources? Let's list the types of resources your organization uses to fulfill its mission.

(Record participant definitions on flipchart paper. It is important that participants consider a wide range of resources, not that they list all those suggested below. Suggested answers to supplement ideas raised by participants:)

- *Human—skills, experience, ideas*
- *Physical—facilities, equipment*
- *Social or Political—partnerships, good will, reputation, favorable policies*
- *Financial—unrestricted funding, access to credit, willingness to pay*
- *Natural advantages—location, good rains, good soils*
- *And many others…*

Say: Resources are more than just money or even people. With this in mind, "resource mobilization" describes the process organizations use to acquire and put to use those things they need to implement activities and pursue their mission. For example, building a good reputation is a critical part of a resource mobilization strategy that is not explicity about looking for money.

Resource mobilization often focuses on generating funds. However, it must also include building valuable contacts and networks, and earning the interest, support, and in-kind contributions of people important to your organization. So, resource mobilization goes beyond fund raising; it is *friend* raising as well.

Resource mobilization is a process that includes identifying, building and managing relationships with people who share the same values and concerns as your organization.

> **FACILITATOR'S NOTE**
>
> This is a group exercise. Ask the group to choose a secretary to record responses and a representative to report out.
>
> Move around the room to observe, encourage participants and provide input if asked.
>
> Keep strict time. Allot 10 minutes for filling in the handout and up to 10 minutes for discussion and debrief.

EXERCISE

Resource Mobilization: Who Does It and How

Hand out: *Resource Mobilization—Roles and Responsibilities*

Resource Mobilization: Roles and Responsibilities

Even though your job description may not list "resource mobilization" as part of your duties,

INSTRUCTIONS

For each of the staff member roles in the left column below, enter the resource mobilization role(s) and responsibilities in the right column next to it. See the example under Board of Directors.

Players in Resource Mobilization	Roles and Responsibilities

Explain: In a sustainable organization, *everyone* is responsible for resource mobilization! Using the handout, *Resource Mobilization: Roles and Responsibilities,* consider each of the positions in your organization in the left column (for example, Board of Directors, program coordinator, and so on). In the right column, list their corresponding roles and responsibilities (for example, Board of Directors—networks with potential donors). You will have 10 minutes to write down your ideas.

Say: Time. Let's hear and discuss your answers.
(See handout for suggested answers to supplement ideas raised by participants.)

Hand out: *Resource Mobilization: Who Does It and How*

Resource Mobilization: Who Does It and How

A summary of possible roles and responsibilities of NGO Board, management and staff follows. Note that it is everyone's best interest to reach out and share your NGO's work and successes with the wider community and, in turn, bring back important news, connections, and leads that may help your organization thrive.

Players in Resource Mobilization	Roles and Responsibilities

Debrief: *Ask participants to compare their ideas with those on the summary. What did they observe about the differing roles and responsibilities? Does everyone truly have a role to play in resource mobilization? Are there some roles that all staff members have in common?*

Wrap up

Remember, resource mobilization must rest firmly on a solid organization and strong programs. You can not look outside without first looking inside at the systems and processes governing the roles and responsibilities of the Board and staff; management of human, physical and financial resources; strategic planning; implementation of programs, and effective and transparent stewardship of donor funds. A sterling reputation and strong organization are corner stones of a resource mobilization strategy.

Guidance on strengthening your systems and process may be found online at *www.npi-connect.net*.

Resource Mobilization: Roles and Responsibilities

Even though your job description may not list “resource mobilization” as part of your duties, in a sustainable organization, it is everyone’s responsibility!

Staff members at every level have a role to play in mobilizing resources. Some staff members are responsible for representing the organization to its donors and at official functions. Others are the lead writers on proposals that will be approved for funding. What about those staff members that interact with local government officials or coordinate implementation activities with community organizations? How about those who assess and manage the organization’s operational costs?

INSTRUCTIONS

For each of the staff member roles in the left column below, enter the resource mobilization role(s) and responsibilities in the right column next to it. See the example under Board of Directors.

Players in Resource Mobilization	Roles and Responsibilities
Board of Directors/ Board of Trustees/ General Assembly	Represent the organization at high level official functions, conferences, and meetings.
Chief Executive Officer/ Executive Director/ Managing Director	
Senior Managers	
Program Staff/ Field Staff	
Finance Staff	
Administration Staff/ Procurement Staff	

Resource Mobilization: Who Does It and How

A summary of possible roles and responsibilities of NGO Board, management and staff follows. Note that it is in everyone's best interest to reach out and share your NGO's work and successes with the wider community and, in turn, bring back important news, connections, and leads that may help your organization thrive.

Players in Resource Mobilization	Roles and Responsibilities
Board of Directors/ Board of Trustees/ General Assembly	• Network with potential donors and implementing partners • Provide leadership and input to strategic planning activities • Oversee the Managing Director (CEO or Executive Director) • Share the organization's work and successes with the wider community • Inform management of important news, connections, and leads • Represent the organization at high level official functions, conferences, and meetings
Managing Director/ Chief Executive Officer (CEO)/ Executive Director	• Manage all resource mobilization activities • Lead or supervise business development/proposal development • Manage relationships with government • Monitor relevant trends and new developments at international or national level • Represent the organization at high level official functions, conferences, and meetings • Network with potential donors and implementing partners at international or national level • Provide leadership and input to strategic planning activities • Share the organization's work and successes with the wider community • Inform staff of important news, connections, and leads
Senior Managers	• Contribute to proposal development • Monitor relevant trends and new developments at local levels • Represent the organization at local functions and meetings • Develop project budgets • Provide leadership and input to strategic planning activities • Inform management of important news, connections, and leads
Program Staff/ Field Staff	• Maintain awareness of donor and implementing partner actions at local level • Maintain relationship with government at local level • Share important information with senior leadership • Maintain relationships with local communities • Share the organization's work and successes with the wider community • Share important news, connections, and leads
Finance Staff	• Collect and analyze all financial information • Contribute to budget development and financial projections • Share the organization's work and successes with the wider community • Inform management of important news, connections, and leads
Administration Staff/ Procurement Staff	• Contribute to cost calculations • Collect pro forma invoices & perform other procurement functions • Share the organization's work and successes with the wider community • Inform management of important news, connections, and leads

MODULE 2.2

Introducing Resource Mapping and the Funding Landscape

ABOUT THIS ACTIVITY

TIME

30 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ describe resource mapping and the funding landscape, and
- ✔ identify which major donors and NGOs operate in their environment.

MATERIALS

- ☐ Flipcharts, markers, tape
- ☐ Handouts—*The Funding Landscape; The Funding Landscape: Where are the resources?*

FACILITATOR'S NOTE

This session explains the resource mapping process. Before beginning the mapping exercises, participants will explore an overview of types of donors and an illustrative resource landscape. Next, they will get acquainted with a tool to help them find out how much they really need to raise and what resources must be mobilized in order to continue the work they do.

Say: In the previous section we defined "resources" and "resource mobilization". Now let's discuss "resource mapping"; what it is and how it relates to "resource mobilization". Resource mapping guides organizations through a process of actively exploring and connecting with the people in the community who have various degrees of affinity with your programs. It is primarily used to identify where the organization should focus its networking and resource mobilization efforts.

Resource mapping can be done in several different ways. In general, it includes at least three elements:

1. An understanding of the resources the organization needs over a period of time
2. An inventory of current and projected resources possessed or controlled by the organization
3. An assessment of potential resources available in the funding landscape

Ask: What do we mean by the funding landscape?

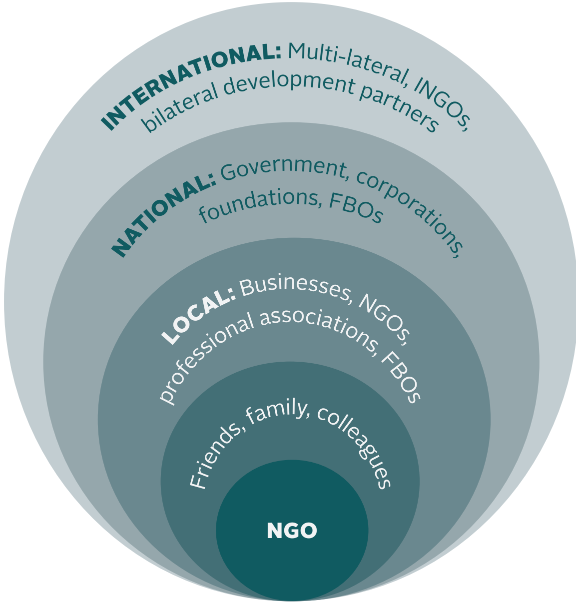
(Record participant definitions on flipchart paper. Depending on the nature of the responses, also explain the following.)

Explain: The "funding landscape" refers to the collection of potential donors available to provide resources in your organization's geographic and programmatic area. It includes any entity or institution that offers its own direct funding or acts as a secondary distributer of funds (sub-grants). The funding landscape will likely include donors with offices in your geographic region or country but may also extend to those only available through technology such as via the internet.

Ask: The landscape contains many different prospective sources of support. What are some types of donors?

*(Write responses on flipchart. Place them within the concentric circles as illustrated, then, refer to the handout—*The Funding Landscape *—to supplement the responses of the participants.)*

The Funding Landscape*



Hand out: *Charting the Funding Landscape: Where are the resources?*

Charting the Funding Landscape: Where are the resources?

INSTRUCTIONS

1. **Review this list** of different types of donors that typically operate in developing countries.
2. **Looking at the table** that

National Governments

National government bodies are often a source of development funds either directly or as a channel for bilateral and multilateral donors. It is important to establish close relationships with the relevant line

Foundations and other private sources of funding are becoming increasingly important globally. Each foundation has its specific focus and rules. A module of this kind cannot guide you through these, but

Say: Take a look at the handout to supplement our list of types of donors.

- **National Governments**—often a source of development funds either directly or as a channel for bilateral and multilateral donors. It is important to establish close relationships with the relevant line ministries (Health, Education, etc.) in order to understand their priorities and procurement procedures.

* *Resource Mobilization: A Practical Guide for Research and Community-Based Organizations.* 2nd edition. Venture for Fund Raising. 2009. www.idrc.ca/EN/Programs/Donor_Partnerships/Documents/Donor-partnership-guide-hyperlinked.pdf

- **Bilateral Development Partners**—typically provide funds directly to national governments or to NGOs through competitive funding programs making them one of the most important actors in the funding landscape. Bilateral donors often maintain an office in the host country making them an excellent target for face-to-face networking.

- **Multilateral Development Partners**—often work through host country systems such as government line ministries or provide credit and financial services directly to national governments. Some offer competitive project funding to NGOs and private sector firms making them good contacts for local NGOs. Multilateral donors are often also a critical source of primary research about a local country context.

- **Foundations**—and other private sources of funding are becoming increasingly important globally. Each foundation has its specific focus and rules. A module of this kind cannot guide you through these, but a careful reading of their published requirements, combined with the general principles you have learned here, can lay the groundwork for useful dialogue with the ones most interested in your needs.

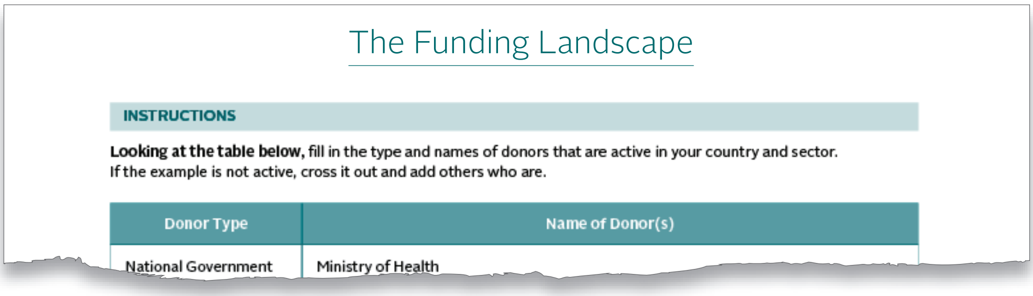
- **International NGOs**—INGOs have a dual role in the funding landscape. They can serve as a potential donor by providing grants or subcontracts, or they may serve as a potential partner or collaborator. International NGOs are usually headquartered in another country but might maintain a local office.

- **Local NGOs**—some well established local NGOs may also make sub-grants with funds from national or international development partners. Local NGOs who receive sub-grants may seek partners to implement activities for which they do not have the capacity or experience.

- **National Corporations/Local Businesses**—partnerships with corporations can be more flexible than working directly with bilateral or multilateral donors. Support might be in cash or in-kind and come with fewer compliance requirements. Successful partnerships with corporations often have a connection between the mission of the organization and the core business of the corporation.

- **Faith-based Organizations/Networks**—FBOs or religious communities are frequent supporters of small, grass-roots organizations. Such partnerships typically have a spiritual as well as financial dimension and, as with private sector support, often come with fewer compliance requirements, making them easier to manage.

Hand out: *The Funding Landscape*



The Funding Landscape

INSTRUCTIONS

Looking at the table below, fill in the type and names of donors that are active in your country and sector.
If the example is not active, cross it out and add others who are.

Donor Type	Name of Donor(s)
National Government	Ministry of Health

Say: Look at the handout—*The Funding Landscape.* This is a tool you can use to describe your donor landscape. Which of the types of donors we just discussed are active in your country and in your sector?

It is inevitable that the donor landscape will change over time. There may be shifts in policy, practice, and even staff. To be ready, organizations must keep up with trends in policy and practice that are relevant to their work.

Ask: What are some ways in which your organization can stay current on shifts in funding trends? Who would you talk to? Where would you get this kind of information? Let's list some strategies, that is, actions to take.

(Write responses on flipchart. Then, refer to the list below to supplement participant responses.)
Examples of strategies:

- *Appoint a staff committee whose task is to assess the landscape*
- *Designate a staff person to read the local news for announcements and notices related to your core areas of interest*
- *Listen to what your core network of peers, friends and partners are talking about and decide if it is relevant and worthy of further exploration*
- *Tap into your relationships with international NGOs—Ask what they know about new initiatives and practices and technologies*
- *Invite speakers from international Non-governmental organizations (INGOs,) Foundations, Bi-lateral Funding Agencies to question and answer sessions at your organization*

Ask: What are some sources?
Examples of sources:

- *Local newspapers*
- *Online news outlets*
- *Collaborative Partners*
- *Professionals in your field*

Ask: Who will share an example of when they assessed the landscape? If you have ever tried to find out about funding opportunities, what did you do? What happened?

Wrap up

The funding landscape is not stagnant. Donors, as well as programmatic and funding priorities change over time, influenced by a variety of internal and external factors. As a result, it is important for your organization to stay up-to-date on these trends and to be able to respond in good time. In line with this, the activities that follow are designed to help you connect to the funding landscape and take advantage of existing and new linkages.

Charting the Funding Landscape: Where are the resources?

INSTRUCTIONS

1. **Review this list** of different types of donors that typically operate in developing countries.
2. **Looking at the table** that follows, fill in the types and names of donors that are active in your country and in your sector.

National Governments

National government bodies are often a source of development funds either directly or as a channel for bilateral and multilateral donors. It is important to establish close relationships with the relevant line ministries (Health, Education, etc.) in order to understand their priorities and procurement procedures.

Bilateral Development Partners

Bilateral donors typically provide funds directly to national governments or to NGOs through competitive funding programs making them one of the most important actors in the funding landscape. Bilateral donors often maintain an office in the host country, making them an excellent target for face-to-face networking.

Multilateral Development Partners

Multilateral donors often work through host country systems such as government line ministries or provide credit and financial services directly to national governments. Some offer competitive project funding to NGOs and private sector firms making them good contacts for local NGOs. Multilateral donors are often also a critical source of primary research about a local country context.

Foundations

Foundations and other private sources of funding are becoming increasingly important globally. Each foundation has its specific focus and rules. A module of this kind cannot guide you through these, but a careful reading of their published requirements, combined with the general principles you have learned here, can lay the groundwork for useful dialogue with the ones most interested in your needs.

International NGOs

International NGOs have a dual role in the funding landscape. They can serve as a potential donor by providing grants or subcontracts, or they may serve as a potential partner or collaborator. International NGOs are usually headquartered in another country but might maintain a local office.

National Corporations/Local Businesses

Partnerships with corporations can be more flexible than working directly with bilateral or multilateral donors. Support might be in cash or in-kind and come with fewer requirements. Successful partnerships with corporations often have a connection between the mission of the organization and the core business of the corporation.

Faith-based Organizations/ Networks

Faith-based organizations (FBOs) or religious communities are frequent supporters of small, grass-roots organizations. Such partnerships typically have a spiritual as well as financial dimension and, as with private sector support, often come with fewer compliance requirements, making them easier to manage.

Charting the Funding Landscape

EXERCISE

The Funding Landscape

INSTRUCTIONS

Looking at the table below, fill in the type and names of donors that are active in your country and sector. If the example is not active, cross it out and add others who are.

Donor Type	Name of Donor(s)
National Government	Ministry of Health
Regional/Provincial Government	
Local Government	
Bilateral Development Partners/Donors	US Agency for International Development (USAID)—United States Canadian International Development Agency (CIDA)—Canada
Multilateral Development Partners/Donors	United Nations Agencies The World Bank African Development Bank (AfDB) Asian Development Bank (ADB)
Foundations	Bill & Melinda Gates Foundation (International) Mo Ibrahim Foundation (Regional) Coca-Cola Foundation (International) Stanbic Bank (Regional) The Asia Foundation (Regional)
International NGOs	FHI 360 Catholic Relief Services (CRS) CARE
National Corporations	
Local Businesses	
Faith-based Organizations/ Networks	

MODULE 2.3

Setting Resource Mobilization Targets

ABOUT THIS ACTIVITY

TIME

30 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ set targets for how much money and what resources must be mobilized to sustain a program/ project.

MATERIALS

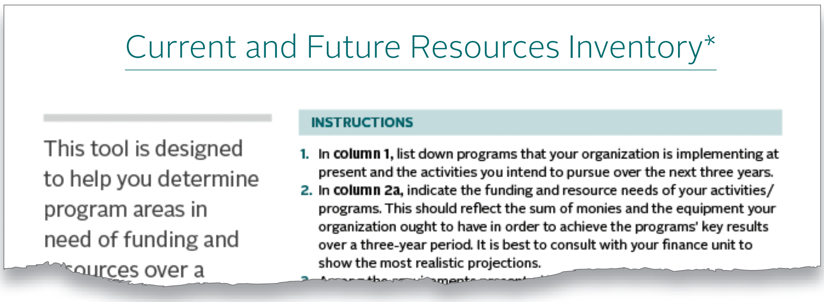
- ☐ Flipchart, markers, tape
- ☐ Handout—*Current and Future Resources Inventory*

FACILITATOR'S NOTE

This module might be difficult for non-finance staff. Rather than conducting this module with a full team, consider asking the finance manager to complete the exercises before the training. Then, invite him or her to help facilitate the module.

Say: We'll start by taking stock of what your organization has in hand and then look at what it needs over time to do its work. The results of this inventory will help you set targets for how much money you really need to raise and what resources you really need to mobilize to achieve sustainable results.

Hand out: *Current and Future Resources Inventory*


Current and Future Resources Inventory*

This tool is designed to help you determine program areas in need of funding and resources over a

INSTRUCTIONS

1. In **column 1**, list down programs that your organization is implementing at present and the activities you intend to pursue over the next three years.
2. In **column 2a**, indicate the funding and resource needs of your activities/ programs. This should reflect the sum of monies and the equipment your organization ought to have in order to achieve the programs' key results over a three-year period. It is best to consult with your finance unit to show the most realistic projections.

EXERCISE

Inventory of Current and Future Resources*

Say: Take a look at the handout—it is a tool designed to help you see where you stand now and determine program areas in need of funding and resources over a three-year period. Let's review the instructions and sample. If you do not have accurate figures right now, it is OK to project them. However, after the training, work with your finance staff to obtain the real numbers.

Instructions:

1. In column 1, list down programs that your organization is implementing at present and the activities you intend to pursue over the next three years.
2. In column 2a, indicate the funding and resource needs of your activities/programs. This should reflect the sum of monies and the equipment your organization ought to have in order to achieve the

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programs' key results over a three-year period. It is best to consult with your finance unit to show the most realistic projections.

3. Among the requirements presented in column 2a, specify the amount of funds and in-kind resources that already exist with your organization. Again, confer with your finance unit to get the most updated figures.
4. Column 3 should be able to show the variance between column 2a and 2b in terms of funds needed, as well as present a listing of items and equipment. These are the resource gaps, which would be the resource mobilization targets and the basis of developing your resource mobilization program.
5. In column 4, indicate the sources of your available funds and resources. Include individual contributors, donor agencies and funding partners, other non-profit organizations, resource mobilization strategies, etc.
6. Draw an arrow in column 5 to show until when the money and resources will be available.
7. The last column must indicate if the available funds in column 2b are restricted, that is, to be used only as proposed or how you have committed it to be spent/utilized, or unrestricted, that is, to be utilized freely, when you want to or whenever it is necessary.

Now, let's put this tool to work. In the next five minutes, choose one aspect of one current activity and fill in the information in columns 1-6 to learn where it stands; whether there are any resource gaps, and what is needed to fill those gaps.

Debrief: *Following the exercise, ask:*

- *What did your inventory show?*
- *What kind of picture does it present?*
- *What resource mobilization targets does it suggest?*

Wrap up

This activity may have been difficult to complete without your actual financial information, but it is critical that your organization understands its true financial needs. Everyone on your project should have a good understanding of your financial situation. If not, be sure to sit down with your finance manager so that everyone can understand and work together toward resource mobilization.

Current and Future Resources Inventory*

This tool is designed to help you determine program areas in need of funding and resources over a three-year period. It is best to consult with your finance staff to determine the current status of a program or activity and to show the most realistic projections.

INSTRUCTIONS

1. In **column 1,** list down programs that your organization is implementing at present and the activities you intend to pursue over the next three years.
2. In **column 2a,** indicate the funding and resource needs of your activities/programs. This should reflect the sum of monies and the equipment your organization ought to have in order to achieve the programs' key results over a three-year period. It is best to consult with your finance unit to show the most realistic projections.
3. Among the requirements presented in **column 2a,** specify the amount of funds and in-kind resources that already exist with your organization. Again, confer with your finance unit to get the most updated figures.
4. **Column 3** should be able to show the variance between column 2a and 2b in terms of funds needed, as well as present a listing of items and equipment. These are the resource gaps, which would be the resource mobilization targets and the basis of developing your resource mobilization program.
5. In **column 4,** indicate the sources of your available funds and resources. Include individual contributors, donor agencies and funding partners, other non-profit organizations, resource mobilization strategies, etc.
6. Draw an arrow in **column 5** to show until when the money and resources will be available.
7. The **last column** must indicate if the available funds in column 2b are restricted, that is, to be used only as proposed or how you have committed it to be spent/utilized, or unrestricted, that is, to be utilized freely, when you want to or whenever it is necessary.

SAMPLE: ***Activists for Hope* —Job Training for Positives**

1. Activity/ Program	2. Resources		3. Resource Gaps/Needs	4. Resource Providers	5. Timeline			6. Resource classification
	2a. Required	2b. Available			Year 1	Year 2	Year 3	
Website	USD$10,000; Tech partner; Internet hosting service	USD$8,000 IT consultant; ABC Servers. Ltd.	Money ($2000 hosting fee for 2 years	United Bank				Unrestricted
Core team	$USD 100,000	$100,000/yr	Money ($10,000)	USAID				Restricted
Monitoring and Evaluation	2 notebook computers	$500 for 1 notebook computer	$500 for 2nd notebook; Staff technical support	USAID				Restricted
TOTAL TARGET			**USD$12,500**					

* *Resource Mobilization: A Practical Guide for Research and Community-Based Organizations.* 2nd edition. Venture for Fund Raising. 2009. www.idrc.ca/EN/Programs/Donor_Partnerships/Documents/Donor-partnership-guide-hyperlinked.pdf

PROGRAM NAME

1. Activity/ Program	2. Resources		3. Resource Gaps/Needs	4. Resource Providers	5. Timeline			6. Resource classification
	2a. Required	2b. Available			Year 1	Year 2	Year 3	
TOTAL TARGET								

MODULE 2.4

Mapping

ABOUT THIS ACTIVITY

TIME

30 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ compile a list of personal contacts, and
- ✔ note important facts about each contact that will assist with later sessions.

MATERIALS

- ☐ Handout— ***Mapping Individuals: Who Do I Know?***

FACILITATOR'S NOTE

If participants access social networking sites such as Facebook and Linked In or simple online forums like Google Groups, suggest they use these sites to identify contacts and connect with them.

2.6a Individuals

Say: We have explored the different kinds of donors that make up the funding landscape in this country. The next step in the mapping process is to identify all of the ways that each of you as individuals connect to that landscape through your past and current relationships. This includes colleagues, family, and friends.

EXERCISE

Who do you know?

Say: At first you might think "I do not know anyone" or "I know **too** many people to write down". Relax and open your mind. Think about people you know from:

- Current/past jobs
- Current/past programs
- University
- Place of worship
- Coalitions/task forces
- School or your childhood
- Family, friends, neighbors

You will not be asked to share this information with the group. Just because you have a connection to a donor, does not mean that it would be appropriate for you to ask that person for help. The point of this exercise is to help you think through ways that you could access donors if you chose to.

Hand out: *Mapping Individuals: Who Do I Know?*

Mapping Individuals: Who Do I Know?

Everyone has a role to play expanding the organization's network. Use this

INSTRUCTIONS

This form is designed to help you collect and organize information related to your formal and informal networks.

- Formal networks are connections you make through work or related events, such as civic club or association groups and meetings. At work, they are the people you communicate with as part of doing business such

FACILITATOR'S NOTE

You may want to refer to the funding landscape concentric circles you drew on a flipchart page to reinforce the mapping concept. Participants should complete this exercise individually. Debrief as a group when finished.

Wrap up

By doing this exercise, did you discover that some of your friends or acquaintances might also have something to contribute to your resource mobilization efforts? Did you discover any new connections between yourself and donors or NGOs that you had not realized?

BREAK: 10 minutes

ABOUT THIS ACTIVITY

TIME

30 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ compile a list of donors that support organizations in their geographic areas, and
- ✔ note important contacts and information related to each donor.

MATERIALS

- ☐ Handout—*Mapping Donors*

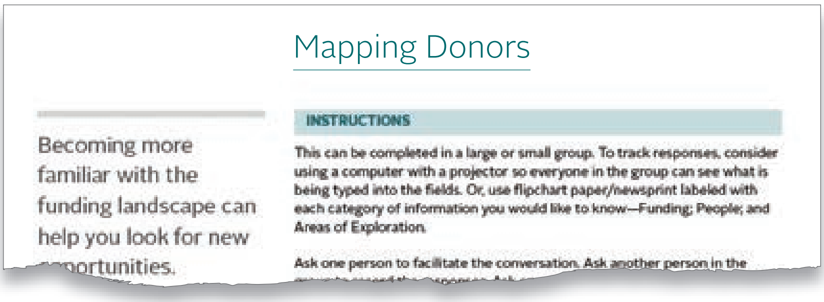
FACILITATOR'S NOTE

Ask participants to work in pairs. Each group will have 25 minutes to complete as many donor information sheets as possible. Debrief as a group when finished.

2.4b Donors

Say: Resource mapping is a complex task requiring the effort of all staff members. So far in this module we have articulated the various resource mobilization roles that staff have and explored the size and scope of the funding landscape. Donor mapping brings the two together drawing on the combined experience, awareness, and connections that staff have regarding different donors by consolidating information in one location.

Hand out: *Mapping Donors*


Mapping Donors

Becoming more familiar with the funding landscape can help you look for new opportunities.

INSTRUCTIONS

This can be completed in a large or small group. To track responses, consider using a computer with a projector so everyone in the group can see what is being typed into the fields. Or, use flipchart paper/newsprint labeled with each category of information you would like to know—Funding; People; and Areas of Exploration.

Ask one person to facilitate the conversation. Ask another person in the

EXERCISE

Donor Mapping

Say: This is an open exploration of the donor community and should not be limited to those funding your current area of focus or expertise. In other words, think about donors outside your current field. For example, if you work in health, which donors fund agriculture? There may be opportunities to overlap with an agricultural project. Other activities in this module will help you explore more information about the donors with which you are less familiar. Becoming more familiar with the big funding landscape is critical for locating new opportunities.

FACILITATOR'S NOTE

This activity—Donor Mapping—builds on earlier exercises the *Funding Landscape and Mapping Individuals.* Drawing from both lists, participants will begin to assemble and organize what they know about the various actors into a donor map.

Debrief:

- *Do you record this kind of information about organizations or do you typically rely on individual contacts? If so, how often is it reviewed and updated?*
- *What new observations or insights did you gain after reviewing the information you gathered?*
- *During the process, did anyone find that their information was outdated?*
- *What, if any, additional questions could be added to the form? How could you use the information?*

Wrap up

Remember: Resource mapping is not about having the perfect map. It is about the process undertaken to learn new information and skills along the way.

The information you compiled in your individual and donor maps will change over time. At bilateral and multilateral donors and INGOs, priorities and funding strategies may shift. Familiar donors may end funding or new donors may enter the scene. Moving forward, it will be important to revisit these two exercises periodically to stay current.

Mapping Individuals: Who Do I Know?

Everyone has a role to play expanding the organization's network. Use this exercise as a starting point. Cast as wide a net as possible, knowing that this list or map will evolve over time.

INSTRUCTIONS

This form is designed to help you collect and organize information related to your formal and informal networks.

- Formal networks are connections you make through work or related events, such as civic club or association groups and meetings. At work, they are the people you communicate with as part of doing business such as existing and former colleagues, volunteers, vendors or other service providers.
- Informal networks are distinct from formal networks in that they are not officially recognized or mandated by organizations. Their connections may be work-related, personal, or social and involve family, friends, classmates or neighbors.

If, at any point during the mapping process, you find yourself saying "I don't know" or "I am stuck" or "I cannot think of anyone/any donors/any colleagues", ask yourself the following questions.

Formal or professional networks

Who do I know through existing

- Partners
- Donors
- Vendors
- Referral sources

Who do I know through former

- Partners
- Donors
- Vendors
- Referral sources

Who do I know through current or past programs?

Who are my former colleagues?

- Who do they work for now?
- Does their organization fund projects?
- Who are their funders?

Who do I know through past jobs?

- Where to they work?
- Who do they interact with regularly?

Who have I met at conferences?

Who do I know through coalitions or task forces I participate in?

Informal or personal networks

Who in my family works in a similar field of work?

Who in my family has a connection to someone working in a similar field of work?

- Does my family member know someone working for a donor, implementer, NGO, or vendor?

Who do my friends work for?

Do the parents of my child's friends/spouse's colleagues work in a similar field of work?

- Who do they work for?
- Who do they know?

Also think about:

- Neighbors
- Classmates (grade school through University)

Others?

Use the worksheet that follows—categorized by Donor, NGO, Vendor, Colleague—to list the name of the person, where he or she works, how you know this person, and how well you know him or her.

Use the rankings (1 – 5) as a guide to determine how well you know this person.

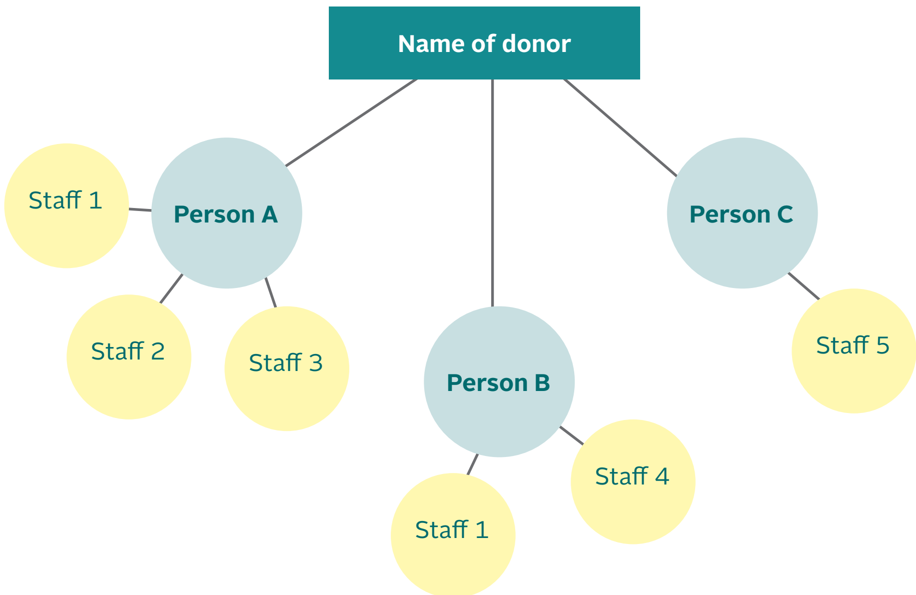
Ranking	Definition	Examples
1	Unknown...someone you do not know, but you know someone who knows this person	• Friend of a coworker • Mother of a neighbor • Spouse of friend • Teacher's sibling
2	Loosely affiliated...someone you met once or twice, but do not interact with them/ have not interacted in a long time	• Met at a conference • Former coworker • Parent of child's friend • Former implementing partner
3	Acquaintance...someone you speak with on occasion and you have a friendly rapport	• Task force member • Former colleague • Past • Volunteer
4	Good friend...someone who you speak with on a regular basis and with whom you have a friendly rapport	• College friend • Friend of spouse • Colleague • Fellow coalition member
5	Dear friend...someone who will do anything for you and vice versa	• Family • Childhood friend • Neighbor • Longtime colleague

An example of how a map of one NGO's (many) connections to one donor might look

Take your time. This information will help you and your co-workers build an overall map of existing linkages for the organization.

Copy the worksheet as needed to capture the contacts or type the information into a central database or spreadsheet. Use the template provided to define the fields.

Share only the information you are comfortable discussing publicly.



EXERCISE

Person's name	Category: Donor; Vendor; NGO; Colleague; Other	Where does the person work?	How do I know this person?	How well do I know this person? (Ranking)
Example: Mary Smith	Colleague	Women United for Health	Met at [name of] conferences	2

Mapping Donors

Becoming more familiar with the funding landscape can help you look for new opportunities.

INSTRUCTIONS

This can be completed in a large or small group. To track responses, consider using a computer with a projector so everyone in the group can see what is being typed into the fields. Or, use flipchart paper/newsprint labeled with each category of information you would like to know—Funding; People; and Areas of Exploration.

Ask one person to facilitate the conversation. Ask another person in the group to record the responses. Ask one person to type the responses on the activity worksheet after the exercise is completed. This information should be recorded in a centralized location so that all staff have access to it. Now, cast as wide a net as possible.

1 **In a group, brainstorm all donors working and/or supporting work in your country that you are aware of.** List them on a flipchart page or type into a computer.

- List all donors whether you have a link to the donor agency or not. Include major international NGOs.
- List the donor regardless of the funding, technical, or programmatic area. In other words, do not limit your thinking to only those funding your current area of focus or expertise, for example, HIV/AIDS, or testing and counseling.

2 **Choose one donor to begin.** You will repeat these steps for each donor. Do not worry if you do not have all of the requested information, Module 2.6 of Going the Distance provides tips to help you collect additional information on prospective donors.

Take your time. This information will help you and your co-workers build an overall map of existing linkages for the organization. Fill in the worksheet that follows or type the information into a central database or spreadsheet. Use the template provided to define the fields.

3 **Complete one form for each donor.**

4 **Repeat steps 2 and 3 for each donor.**

DONOR NAME:

Funding	Responses	
What does the donor fund?		
	List any information you have no matter how basic.	
Does your organization have current programs with it?		
	• Is the program successful/well received by the donor?	
	• Do you have a good relationship with the donor?	
Does your organization have past programs with it?		
	• Was the program successful/well received by the donor?	
	• Did you have a good relationship with the donor?	
People	**Responses**	
Do you know of someone working for this donor?		
	• If so, list the name regardless if you have a link to them or not.	
	• Do you have a link to this person?	
Do you have link in your organization to someone who works for this donor?		
	If yes, list each contact person and the staff/board member with strongest connection.	

Areas of exploration	Responses	
If you do not have a link to someone working for this donor, but know a name, think about possible connections through your network to link to this person.		
	• Other donors • NGOs • Vendors • Government contacts	
Who would you like to know at this donor?		
	If you do not have a contact name, what type of person, i.e., what's the job title/ position of the type of person you would like to have a connection with at this agency? Executive director?	
What you would like to know about the donor?		
	• Funding trends? • Funding priorities? • Programmatic priorities? • Technical areas of interest? • Target populations/audiences? • Other?	

MODULE 2.5

Donor Gap Analysis

ABOUT THIS ACTIVITY

TIME

30 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ list 2-3 donor or organization targets and key missing information about each
- ✔ describe ways to collect the needed information.

MATERIALS

- ☐ Flipchart, markers, tape
- ☐ Handout—*Gap Analysis Worksheet*

FACILITATOR'S NOTE

Before beginning this session, prepare a flipchart sheet displaying the two Gap Analysis Equations from the box at right. Use them to illustrate what is meant by "gap analysis".

Say: As you began to map the donors and individuals in the funding landscape, you probably noticed that there are donors you know little about or with whom you have no connection. These are your "gaps." In this session, you will use a tool to help you identify the gaps and prioritize which gaps to fill.

Refer to the flipchart to reinforce the understanding of "gaps".

Gap Analysis Equations:

Your Desired Information — (minus) Your Known Information = **Your Gaps**

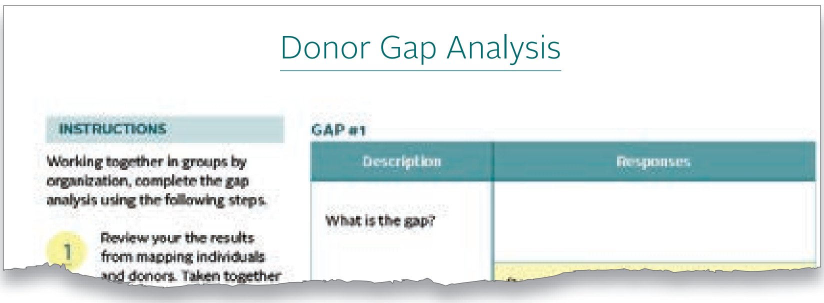
Your Desired Connections — (minus) Your Existing Connections = **Your Gaps**

Say: In previous exercises, you were encouraged to be open when identifying and mapping donors and your personal contacts. You were asked to list donors regardless of the funding, technical, or programmatic area. Next, you will choose a resource mobilization objective or target that you identified when you took an inventory of current and future resources. For example,

- To continue our website, we need. . .
- To learn whether [project] is feasible, we need. . .
- To evaluate our [project], we need. . .

Setting the objective is the most important factor in your gap analysis.

Hand out: *Donor Gap Analysis worksheet*


Donor Gap Analysis

INSTRUCTIONS

Working together in groups by organization, complete the gap analysis using the following steps.

1 Review your the results from mapping individuals and donors. Taken together

GAP #1

Description	Responses
What is the gap?	

FACILITATOR'S NOTE

Depending on how many people are gathered, you may want to break the group into twos or threes. Ask each pair or trio to identify an objective or target. Suggest they refer to their inventory of current and future resources.

Ask each group to choose a secretary to record responses and a representative to report out.

Keep strict time. Move around the room to observe, encourage participants and provide input if asked. Ensure that each group is able to successfully identify at least three key gaps in knowledge or contacts and articulate how they might fill them.

EXERCISE

Donor Gap Analysis

Instructions:

Over the next 20 minutes you will work with the *Gap Analysis Worksheet.* Start by choosing your resource mobilization target—be specific about why you need money and/or other resources. Look back at what you identified when you took an inventory of current and future resources. As you complete the worksheet, identify at least three key gaps in knowledge or contacts and ways you might fill them in. For example, you are looking to support a feeding program for orphans, so you want to learn who has a contact at a foundation or corporation that already supports such programs. Or, you need to cover the cost of hosting your website, so you want to see if anyone has a contact at a local internet service provider.

Say: Time. Let's share the gaps you identified and list what you could do to fill them.

(Write responses on flipchart. Then, refer to the list below to supplement participant responses.)

- *Word-of-mouth*
- *Online NGO communities (NGO Pulse www.ngopulse.org)*
- *Being an active member of an organization or association that serves as the voice of your sector's NGOs*
- *Internet (websites)*
- *Asking to be added to a donor's mailing list*
- *Joining NGO communities (for example, Grow South Africa www.growsouthafrica.org)*
- *Being connected to virtual communities, for example:*
  - *— SANGOnet*
  - *— IRIN: Humanitarian news and analysis, a project of the UN Office for the Coordination of Humanitarian Affairs*

Next, we will use a strategy to help us fill those gaps.

Donor Gap Analysis

INSTRUCTIONS

Complete the gap analysis using the following steps.

1. **Review your results from mapping individuals and donors.** Taken together both documents should represent your group's collective contacts and understanding of the funding landscape.

   Now, taking into account your group's Resource Mobilization Objective select between three and five key gaps. For example: "USAID/Kenya has shown interest in providing funds directly to local organizations for water, sanitation, and hygiene (WASH) activities, but we have never worked with USAID/Kenya and have no contacts there." If you get stuck consider the following questions:
   - Do we know which donors provide resources similar in type and scope to those we need to achieve our objective?
   - Which donors are most likely to provide to us the resources to achieve our objective?
   - Do we suspect that there are additional donors in the funding landscape that we have not yet identified?
   - If a donor (agency, institution, business or NGO) looks promising, do we have any links or connections to it?

2. **Choose one gap to start** (you will repeat these steps for each gap).

3. **Complete one form for each gap.**

4. **Repeat steps 2-3 for each gap.**

GAP #1

Description	Responses
What is the gap?	
	Describe the gap. Is it primarily a gap in knowledge or contacts? Something else?
Does the gap relate to a specific donor or implementer? If so, then list it.	
Describe how the gap relates to our Resource Mobilization Objective.	
What can we do in the next two weeks to begin filling this gap?	
	If the gap is a contact, do you know the person's name or position? Are there any links (direct or indirect) between your organization and their's? If the gap is knowledge, can you conduct research online or use publications to find an answer?
Describe in detail the steps that our organization will take.	
What resources will we need in order to take the necessary steps?	
Who will be responsible for taking the necessary steps?	

MODULE 2.6

Filling Information Gaps

ABOUT THIS ACTIVITY

TIME

20 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ find information about prospective donors to pursue funding opportunities that match their NGO's growth strategy and/or program areas.

MATERIALS

- ☐ Flipchart, markers, tape
- ☐ Handouts—***Researching Donors: What to look for and How to Find it; 9 Ways to Connect with Prospective Donors***

FACILITATOR'S NOTE

Refer to responses on flipchart from previous exercise.

2.6a Researching Donors

Say: As you developed your individual and donor maps and completed the gap analysis, you probably noticed that no matter how well-connected you are, you still have gaps. These are gaps in direct linkages between the people you already know and the people you would like to know. You can fill these gaps in various ways.

For example, imagine you would like to meet with an HIV/AIDS Program Manager working for USAID at the local Mission, but you do not have a direct link. Review your individual and donor maps to look for any possible links. Ask yourself:

- Can we conduct research online to identify a point person?
- Do we know someone through a partner NGO, service provider/supplier, an informal network, or some formal networks who might have a connection or a link to this person?
- Can someone we know link us to the point person directly or to someone else who knows this person?

Say: You do not want to waste time—yours or the donor's—pursuing funding opportunities that do not match your growth strategy and/or program areas. Therefore, it is important to answer a set of questions before you contact a potential donor. What questions should you ask?

(Write responses on flipchart. Then, refer to the list below to supplement participant responses.)

- *What is their mission?*
- *What are their specific topics of interest?*
- *What type of support do they provide?*
- *Who are their primary beneficiaries?*
- *What is their current funding strategy?*
- *How much money/commodities do they donate every year?*
- *What programs/organizations have they funded in the past?*
- *What is their application process?*

- *What connections do they have, if any, to your organization? (Are they a past or current donor? Do you or your staff have professional or personal contacts with Board members or staff? Refer to your individual map)*

The answers to these questions will help you determine whether or not the organization is likely to fund your work. If your program is consistent with a donor's mission, it may be interested in providing funding or in-kind contributions. The benefit of your organization is that you offer the donor a valuable service.

FACILITATOR'S NOTE

Refer to handout, and as you review the list of places to look for new donors and information about what they fund, ask participants to raise their hands if they have consulted Google/ search engines or donor websites.

To help make decisions about whether or not to pursue a potential donor, create a list of **what the donor wants**. Compare this to a list of **what the situation requires.** Compare both of those to a list of **what your organization can offer.** The points where these three lists overlap are the areas you should focus on in your request to the donor.

Hand out *Researching Donors: What to Look for and How to Find It*

Researching Donors: What to Look for and How to Find It

You do not want to waste time—yours or the donor's—pursuing

It is important to answer the following questions **before** you contact a potential donor:

- What is there mission?
- What are their specific topics of interest?
- What type of support do they provide?

ATTENTION

Remember, information available online may be outdated or incomplete. Always verify the information collected online with an existing or new contact, or through a call to the relevant organization.

Hand out: *Nine Ways to Connect with Prospective Donors*

Nine Ways to Connect with Prospective Donors

Mode of communication	How you can use this mode
1. **Email/Skype**	• As initial correspondence: Email is a good way to introduce yourself, your organization, and the purpose of the correspondence. However, never rely solely on email, especially if it is a new connection. Always follow up with a phone call and reference the email, and when you sent it.

Say: Making a connection with a prospect can be done in many ways and often there are multiple ways to reach the same person. The handout offers some examples. Let's review them. What is missing?

Mode of communication	How you can use this mode
1. Email/Skype	• As initial correspondence: Email is a good way to introduce yourself, your organization, and the purpose of the correspondence. However, never rely solely on email, especially if it is a new connection. Always follow up with a phone call and reference the email, and when you sent it. • As a follow-up correspondence: Email can also be good for following up on a phone call. Some people travel a lot or are not good about returning calls. Email is an easy way to touch base with them and provide a little more information. • To schedule a call. • To share documents or a survey/set of questions (for your resource inventory or to fill gaps). • Skype is a good way to conduct a video chat with remote donors
2. Individual phone calls or 3. Group conference calls	• To make a more personal connection with someone. • To provide more detailed and tailored information. • To ask specific questions for your resource inventory or to fill gaps. • To communicate with several people at once. • To schedule a meeting.
4. In person meetings	• To network. • To make a more personal connection with someone.
5. Conferences 6. Coalition or task force meetings	• To provide more detailed and tailored information. • To ask specific questions for your resource inventory or to fill gaps. • To identify potential partners. • To communicate with several people at once.
7. Social events	• To network. • To provide more detailed and tailored information. • To ask specific questions for your resource inventory or to fill gaps.
8. Existing connections 9. Potential connections	• To network. • To ask specific questions for your resource inventory or to fill gaps. • To identify potential partners.

ABOUT THIS ACTIVITY

TIME

30 minutes

OBJECTIVES

By the end of this session, participants will be able to:

- ✔ understand what an informational interview is,
- ✔ recognize how it can feed into resource mapping, and
- ✔ prepare for and develop questions for informational interviewing.

MATERIALS

- ☐ Handouts—***Informational Interview Tips; Role Play—Information Please***

FACILITATOR'S NOTE

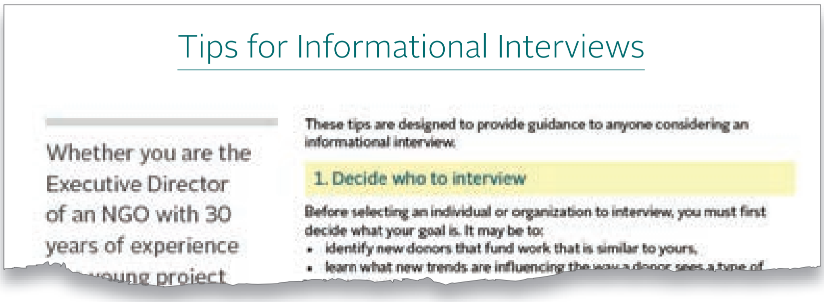
By this point in the process participants should have completed a resource map and analyzed it for gaps, set resource mobilization targets and identified prospects. These prospects are individuals or organizations that are positioned to provide essential resources or information to the organization.

2.6b Preparing for an Informational Interview

Say: Now that we have identified specific individuals or organizations that represent key gaps in our resource map, how should we engage them? One approach to consider is the informational interview. Informational interviews are a way to collect useful information about a potential donor or implementing partner, make important new contacts, and inform others about your organization. They are usually less formal than a business meeting, can be done in person or over the phone and are usually brief, lasting 20-30 minutes.

Unlike with a job interview or an elevator pitch, an informational interview's purpose is **not to persuade** a donor that your project or organization is the best, but rather **to learn more** about a donor's expectations, priorities, decision making process, current activities, and future plans.

Hand out: *Tips for Informational Interviews*


Tips for Informational Interviews

Whether you are the Executive Director of an NGO with 30 years of experience

These tips are designed to provide guidance to anyone considering an informational interview.

1. Decide who to interview

Before selecting an individual or organization to interview, you must first decide what your goal is. It may be to:

- identify new donors that fund work that is similar to yours,

Say: This handout, *Tips for Informational Interviews,* is designed to help you make contact, decide what questions to ask and how to follow up afterward. Let's take a moment to review the handout before we go through an exercise that will give you the chance to practice your interview techniques.

Even though it can sometimes feel artificial or uncomfortable, even the most experienced interviewers benefit from practicing. With each informational interview that you conduct you will see improvements in the questions you ask, the ease with which you deliver them, and your confidence. Now, let's use this opportunity to practice interviews and receive feedback from one another.

FACILITATOR'S NOTE

Decide whether to give the participants time to read the handout before the exercise. If you feel the group would benefit from doing so, read through the tips together and discuss each one as you go along. When the group is ready, proceed to the exercise.

Divide the group into pairs.

EXERCISE

Role Play—Information Please

20 minutes

Scenario:

After doing your research, you identified an international foundation with offices in your country whose mission, focus and donation record appear compatible with what you do. To learn whether you are right about this, what do you do?

Instructions:

1. Planning (2 minutes)

Each participant will have the chance to practice interviewing a potential donor. In each pair, designate each person as either A or B. Plan the order in which you will play each role.

	Person A	Person B
Round 1	NGO Representative	Prospective Donor
Round 2	Prospective Donor	NGO Representative

2. Set-up (2 minutes)

Agree on the profile of the Prospective Donor (for example, international donor—USAID; local business owner; local official) and what you want to learn from the interview. Decide whether it is a telephone or in-person interview.

3. Script (5 minutes)

Develop 10 questions that you will ask the prospective donor. Refer to *Tips for Informational Interviews.*

4. Begin the role play. Your roles are as follows:

NGO representative	Start a conversation that incorporates your 10 questions and allows you to achieve your objective (step 2).
Prospective Donor	Respond as you expect a donor to respond based on the profile developed in the set up

5. Debrief (5 minutes)

Review the exercise by discussing the following questions:

- *What words and phrases worked well?*
- *How did the body language match the words?*

- *Did the interviewer ask follow up questions based on the subject's answers, or did they just stick to the script?*
- *Was the interviewer able to introduce their reason for requesting the interview?*
- *Did the interviewer appear confident?*
- *Did the interviewer conclude by thanking the subject and asking who else he or she should meet with?*
- *Repeat steps 2, 3, and 4*

Switch roles and repeat the role play.

Debrief: *Some points to emphasize:*
- *What words and phrases worked well?*
- *How did the body language match the words?*
- *Did the interviewer ask follow up questions based on the subject's answers, or did they just stick to the script?*
- *Was the interviewer able to introduce their reason for requesting the interview?*
- *Did the interviewer appear confident?*
- *Did the interviewer conclude by thanking the subject and asking who else he or she should meet with?*

Explain: Knowing how to connect with prospective donors in a manner and language they understand, and finding common ground through shared values and interests can be learned. Part 3 of this guide offers guidance on connecting with donors in person and in writing.

As you conduct more and more interviews not only will they become easier, but a picture will begin to emerge about the funding landscape: who the donors are, what their priorities are, who their implementing partners are, etc. In later interviews, ask questions to confirm your understanding of the funding landscape. For example, "It seems as though your organization has a strong focus on____________. Is that correct?" OR "I understand that although in the past your direct funding was to large INGOs, you are beginning to give smaller direct grants to local NGOs. Is this accurate?"

Wrap up

The first stage of resource mobilization is to define what you want funding or other resources for. Just as your organization has a specific niche, so do most donors. Therefore, before you start mapping, clearly **define the problem,** the program (what you plan to do to solve the problem), **the outcomes** (what you expect to be different as a result) and **the budget** (how much you need and for what) required.

ATTENTION

We have discussed why informational interviews can be a critical tool for networking and mapping resources. Remember, they are a professional courtesy from one person to another. In the future, when someone approaches you for an informational interview, be sure to pass on the kindness that you have received.

As a follow up to this session, you will want to meet with your team to seriously research and identify the prospective donors that support the type of work you do or wish to do. Once identified, it will be time to try to establish contact with that donor and, if possible, try to meet with a representative. See Part 3 of this guide for strategies and tactics for connecting with donors in person and in writing.

Researching Donors: What to Look for and How to Find It

You do not want to waste time—yours or the donor's—pursuing funding opportunities that do not match your growth strategy and/or program areas.

It is important to answer the following questions **before** you contact potential donors:

- ☐ What is their mission?
- ☐ What are their specific topics of interest?
- ☐ What type of support do they provide?
- ☐ Who are their primary beneficiaries?
- ☐ What is their current funding strategy?
- ☐ How much money/commodities do they donate every year?
- ☐ What programs/organizations have they funded in the pasts?
- ☐ What is their application process?
- ☐ What connections do they have, if any, to your organization? (Are they a past or current donor? Do you or your staff have professional or personal contacts with Board members or staff?)
- ☐ Are they a past or current donor? (Do you or your staff have professional or personal contacts with donor Board members or staff? Refer to your individual map.)

The answers to these questions will help you determine whether or not the organization is likely to fund your work. If your program is consistent with a donor's mission, it may be interested in providing funding or in-kind contributions. The benefit of your organization is that you offer the donor a valuable service.

To help make decisions about whether or not to pursue a potential donor, create a list of **What the donor wants.** Compare this to a list of **What the situation requires.** Compare both of those to a list of **What your organization can offer.** The points where these three lists overlap are the areas you should focus on in your request to a donor.

Selected places to look for new donors and information about **what they fund**

- Local media (newspapers, magazines, TV, radio)
- Google/search engines
- Donor websites
- Guide Star at www.guidestar.org
- Foundation Center at www.foundationcenter.org
- Charities Aid Foundation at www.cafonline.org
- NGO Pulse at www.ngopulse.org
- Competitors' annual reports
- Philanthropic publications
- Corporation websites
- European Foundation Centre at www.efc.be
- Global Giving at www.globalgiving.com
  (A US hosted website where Southern NGOs can apply to register projects with the aim of attracting the interest of potential funders. The website is promoted to individuals interested in funding Southern NGOS directly.)
- www.euforic.org
  (a social network connecting projects, events, people and organizations engaged in international cooperation and development.)

Nine Ways to Connect with Prospective Donors

Mode of communication	How you can use this mode
1. Email/Skype	• As initial correspondence: Email is a good way to introduce yourself, your organization, and the purpose of the correspondence. However, never rely solely on email, especially if it is a new connection. Always follow up with a phone call and reference the email, and when you sent it. • As a follow-up correspondence: Email can also be good for following up on a phone call. Some people travel a lot or are not good about returning calls. Email is an easy way to touch base with them and provide a little more information. • To schedule a call. • To share documents or a survey/set of questions (for your resource inventory or to fill gaps). • Skype is also a good way to conduct a video chat with a distant donor
2. Individual phone calls or **3. Group conference calls**	• To make a more personal connection with someone. • To provide more detailed and tailored information. • To ask specific questions for your resource inventory or to fill gaps. • To communicate with several people at once. • To schedule a meeting.
4. In person meetings **5. Conferences** **6. Coalition or task force meetings**	• To network. • To make a more personal connection with someone. • To provide more detailed and tailored information. • To ask specific questions for your resource inventory or to fill gaps. • To identify potential partners. • To communicate with several people at once.
7. Social events	• To network. • To provide more detailed and tailored information. • To ask specific questions for your resource inventory or to fill gaps.
8. Existing connections **9. Potential connections**	• To network. • To ask specific questions for your resource inventory or to fill gaps. • To identify potential partners.

Tips for Informational Interviews

Whether you are the Executive Director of an NGO with 30 years of experience or a young project manager in your first assignment, informational interviewing is a powerful tool to expand and deepen the quality of your professional network and, by extension, that of your organization.

These tips are designed to provide guidance to anyone considering an informational interview.

1. Decide who to interview

Before selecting an individual or organization to interview, you must first decide what your goal is. It may be to:

- identify new donors that fund work that is similar to yours,
- learn what new trends are influencing the way a donor sees a type of project, or
- understand more about your competition and their reputation.

Consider using any of the following organizational processes to guide your targeting for an informational interview:

- **Donor mapping**—Use informational interviews to fill any gaps in your resource map.
- **Strategic planning**—Do you know all of the donors who fund work linked to your strategic objectives?
- **Stakeholder analysis**—Start with your current funding partners and ask them to help you make new contacts.

2. Set up the informational interview

Before attempting to schedule an informational interview, develop an outline or script of what you plan to say. This will decrease any anxiety you may have about making contact and ensure that you do not leave forget to share any essential information. Follow these basic guidelines:

- Say who you are and why you want to meet.
- Make it clear that you are not planning to make a plea for funding or to pitch a project idea.
- Mention a personal referral, if any, and/or a mutual interest.
- Ask for a brief meeting or phone call at a convenient time for the contact.

SAMPLE LETTER OR EMAIL

Dear Ms. Moore,

I represent a local organization called Hope for Change and we are researching donors, implementers, and other stakeholders that support orphans and vulnerable children affected by HIV/AIDS in Malawi. Our goal is to identify and share important innovations and trends in such programs as it is a core component of Hope for Change's work.

I heard you speak at last week's USAID/Malawi Implementing Partners Forum and would like to talk with you in more depth about USAID's work in this area, where you see it moving in the future, and any key technical resources that you draw from. Hope for Change is not seeking new project funding at this time, but is always looking for new contacts across a range of different stakeholders.

Are you available during the week of October 5th to meet with me for 20 or 30 minutes? If so, please suggest a convenient time and I would be happy to meet at your office in Lilongwe.

Sincerely,
Hestern Banda
Executive Director, Hope for Change

DOs & DON'Ts

- **Do enlist members** of your network to set up informational interviews, but
- **Don't be afraid to reach out** to a stranger.
- **Do make it clear** that you are not seeking a meeting to plead for funding.

DOs & DON'Ts

- **Do practice** with a friend or colleague if you are not an experienced interviewer.
- **Do research** by reading web pages, annual reports, and other publications, then ask questions that reflect your research.
- **Don't waste the person's time** by asking what could be answered by reading a web page or other published materials.
- **Do come prepared** to give a 1-3 minute explanation of yourself, your organization, and your reasons for meeting. *(See Part 3—The Elevator Speech.)*

SAMPLE TELEPHONE SCRIPT

Hello, my name is Hestern Banda and I am the executive director of Hope for Change, a local organization based in Lilongwe. I received your contact information from Amy Damon, a great friend for many years. She suggested that you might be willing to share your insights and experience with programs designed to support orphans and vulnerable children affected by HIV/AIDS. We are not seeking project funds right now, but we do want to continue deepening our understanding of these issues given how central they are to our mission. Do you have time next week to sit and talk with me for 20-30 minutes? If it's more convenient, could I call your office to chat by phone instead?

3. Prepare for the interview

Preparing for an informational interview is not like preparing for a job interview. For a job interview, your focus may be on readiness to answer questions or to recall instances of past performance, but in an informational interview you should be asking the questions and leading the conversation. Follow these basic guidelines:

- Research the individual or organization. This will make your questions better and demonstrate professionalism and enthusiasm.
- Update your promotional materials and bring them to the meeting, if appropriate. Sharing capability statements, technical publications, evaluation results, and other resources can make a favorable impression.
- Develop your questions ahead of time. Informational interviews are usually relaxed, but also need to be focused.

SAMPLE INFORMATIONAL INTERVIEW QUESTIONS

Depending on your interview objective, considering using or adapting these sample questions.

Questions about the organization

- Which strategic areas or objectives is your organization active in? How were they chosen? How often are they reviewed? Did they change during the last review? If so, how and why?
- What process do you use for developing new programs? Selecting new implementing partners? Procuring services?
- How do you evaluate proposals for funding? Do you ever accept unsolicited concepts?
- What are the common characteristics of the best proposals you have read lately?
- How long has your organization been working in this context? What are the primary challenges you find operating here? Advantages?
- How is your organization similar to and different from others like it?

- How do you see this industry changing in the next five to ten years?
- After reading your web page, I wanted to ask for clarification on __________________?

Technical questions

- What publications, research, or other sources of information do you consult to stay current in your field?
- What networks or forums does your organization participate in? What do you typically learn from them? Are they worthwhile?
- Which implementers working in ¬this context have you been especially impressed with? Why?
- In our work we have found ___________ to be true. Has that been your experience as well? Why or why not?
- What are some key lessons learned from operating in your technical area?
- Is there any niche missing/not covered in the region/country? (Could include a missing conference or coordinating mechanism, a particular skill set, analysis or information)

Questions about other organizations or contacts

- Which implementers have you encountered that do work similar to mine? What is your impression of them?
- In what settings do you typically meet new local organizations?
- Which donors typically support the same kind of work as my organization?
- Is there anyone else that you would recommend I speak with in your organization? From another organization? Would you be willing to introduce me?
- After speaking to other organizations I have found ___________ to be true. What is your experience?

4. During and after the interview

Informational interviews are less formal than job interviews, project pitches, or presentations, but it is still critical to make a strong favorable impression. The purpose of this meeting is NOT to make a plea for funding, but you might be making that plea in the future or your interview subject might review a proposal that you submit one day.

Follow these basic guidelines:

- Dress well for the interview. The meeting may not be very formal, but try to dress at least as formally as you expect your interview subject to be dressed.
- Respect your subject's time. Arrive between five and fifteen minutes before the scheduled time.
- Remember that you are the interviewer. Monitor the meeting length and end on time. Allow for casual conversation, but try to stay on track so that your most important questions are answered.
- Always end the meeting by asking who else you should meet and if you can mention the interview subject's name when you speak to that individual.
- After the interview, promptly follow up on any agreed actions. Send a thank you note or email soon after the interview

DOs & DON'Ts

- **Do** remember that granting you this meeting is a courtesy. Say thank you.
- **Don't think of the interview** as a way to get funding.
- **Do think of the interview** as a way to expand your network and build a relationship.
- **Do come prepared** to discuss a potential project should a donor ask you for ideas.
- **Don't lecture the person** you've come to see, even if you are more knowledgeable about a specific context.
- **Do express a desire** to keep the conversation going by offering to check in with the person again in the future.
- **Don't overstay your welcome.** It is better to signal the meeting is out of time and let the other person continue if they choose to.

Role Play—Information Please

SCENARIO

After doing your research, you identified an international foundation with offices in your country whose mission, focus and donation record appear compatible with what you do. To learn whether you are right about this, you set up an informational interview. What do you say?

1. Planning

2 minutes

Each participant will have the chance to practice interviewing a potential donor. Working in pairs, designate each person as either A or B. Plan the order in which you will play each role.

	Person A	Person B
ROUND 1	NGO Representative	Prospective Donor
ROUND 2	Prospective Donor	NGO Representative

2. Set-up

2 minutes

Agree on the profile of the Prospective Donor (for example, international donor—USAID; local business owner; local official, etc.) and what you want to learn from the interview. Decide whether it is a telephone or in-person interview.

3. Script

5 minutes

Develop 10 questions that you will ask the prospective donor. Refer to Informational Interviews Tips. Remember, this is a chat, not an inquest. Try to weave your key questions into your conversation.

4. Begin the role play.

8 minutes at most

Your roles are as follows:

NGO representative	Start a conversation that incorporates your key questions and allows you to achieve your objective (step 2).
Prospective Donor	Respond as you expect a donor to respond based on the profile developed in the set up

5. Debrief

5 minutes

Review the exercise by discussing the following questions:

- What words and phrases worked well?
- How did the body language match the words?
- Did the interviewer ask follow up questions based on the subject's answers, or did they just stick to the script?
- Was the interviewer able to introduce their reason for requesting the interview?
- Did the interviewer appear confident?
- Did the interviewer conclude by thanking the subject and asking who else he or she should meet with?

6. Repeat steps 2, 3, and 4

Switch roles and repeat the role play. Debrief after each round.

References and Resources

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