

**Resource Mobilisation Strategy Template for**

**Member Associations**

October 2019

# BACKGROUND

## 1) What is a resource mobilisation strategy?

A resource mobilisation strategy is a plan that sets out the funding need for an organisation, project or event over a period of time (typically 3 to 5 years). It also identifies actions, timescales, possible funding sources and resources required to enable the successful and sustainable delivery of services.

A business development strategy has three main components:

**The Vision:** where we want to be at the end of the period

**Operational Plan:** the blue print of how to get there, including annual targets, priority projects, where to grow organically and where to invest resources

**Verifiable Indicators:** What is the definition of success? How will we know we have achieved success?

## 2) Why develop a resource mobilisation strategy?

A resource mobilisation strategy seeks to articulate a commercial approach to meeting a Member Association’s income targets and provide a record of what has been a successful approach in the past as well as providing recommendations for the future.

The strategy should:

* Clearly outline the organisation’s aims, objectives and priorities
* Ensure priorities and targets are realistic, achievable and appropriately costed
* Allocate time, resources and staff effectively to successfully deliver projects
* Ensure better targeting of donors and funding opportunities broadly
* Ensure shared responsibility for reaching funding goals
* Include a workplan for the period including targeted resource mobilisation activities to be undertaken to reach the strategic goal(s).

**This document serves as an illustrative guide to help IPPF Member Associations develop a resource mobilisation strategy.**

# RESOURCE MOBILISATION STRATEGY PROCESS

# SECTION 1: INTRODUCTION

## Organisational Objectives

Briefly outline your organisation’s mission statement, vision and core aims/objectives as applicable. Include an outline of the services that your organisation provides, the needs are met by your organisation’s work, and the key populations you serve.

Agree your timeframe for the strategy *eg. 2019-2022.*

|  |
| --- |
|  |

# SECTION 2: ORGANISATIONAL POSITION

This section includes three key areas:

1. Competitor Analysis
2. SWOT Analysis
3. Organisational Priorities

1. A Competitor Analysis is an important part of your Resource Mobilisation programme for two reasons:

1. It helps you understand what makes your MA’s products or services unique, and which strengths you wish to promote with your potential donors.
2. Understanding your competitor’s strategy, and their strengths and weaknesses helps you develop strategies that help you achieve competitive advantage over them in the future.

**1.1. Conduct research**

Market research, such as through focus groups and questionnaires, can provide your Member Association with valuable information about your competition. The information that you are looking for is – your top competitors, their size and reach, their unique selling point, their strengths, their weaknesses, customer opinions, product/service prices, their growth rates, any indication of their future strategies etc.

**1.2. Gather competitive information**

You can group the sources of competitor information into three categories:

* **Recorded data:** Recorded data refers to data available in published form, for example, in annual reports and service brochures. Such data can be recovered from annual reports & accounts, press releases, newspaper articles, speeches and donor reports.
* **Observable data:** Observable data is often assembled from several sources, for example, competitor pricing. Such data can be recovered from pricing/price lists, advertising campaigns and referral systems.
* **Opportunistic data:** this kind of data requires planning and organization. Much of it is “anecdotal”, coming from discussions with suppliers, customers and, perhaps, previous management of competitors. Such data can be gathered from meetings with donors, seminars or conferences, recruiting ex-employees and social contacts with competitors.

**1.3. Analyse competitive information**

Once you have gathered competitive data, you can begin your analysis. You should analyse to determine product or service information, market share, marketing strategies, and to identify your competition’s strengths and weaknesses.

**CHECKLIST**

\_\_\_ Have you identified your Member Association’s direct and indirect competitors?

\_\_\_ Do you know how the clients in your target market rate your products and/or services in comparison with your co\*mpetitors’?

\_\_\_ Have you compiled the intelligence you have gathered on each competitor in a format that fosters comparison of features and market positions?

\_\_\_ Do you have strategies for building on your Member Association’s strengths and minimizing your vulnerability where you have weaknesses? Do you have strategies for minimizing the value of your competitors’ strengths and taking advantage of their weaknesses?

\_\_\_ Have you communicated the competitor information and your strategies to every employee who needs to know? In programmes and development? In finance? In service provision?

\_\_\_ Have you established procedures for keeping your competitor profiles current?

### Table 1. Competitor Analysis\*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Your Member Association** | **Competitor #1** | **Competitor****#2** | **Competitor****#3** |
| **Overview & Profile** | Complete your profile and a profile for your three most important competitors. Use the recommended sources to find the data and try to get as much info as possible. |  |  |  |
| **Competitive Advantage** | Think about what makes your MA different than your competitors. Then, do the same thing for your three competitors. |  |  |  |
| **Target Groups** | Identify who your target groups are and then do some research on your competitors to see who their target groups are. A good place to start would be their website and looking at their advertising campaigns. |  |  |  |
| **Marketing Strategies** | Write down your current marketing strategies. Get moving and see what your competitors are doing, do some research on their site and do whatever you can to become more familiar with their strategies. |  |  |  |
| **Services** | Complete the services your MA is providing and the quality of the services, rate your MA then your competitors on a consistent scale of 1-10. |  |  |  |
| **Pricing & Costs** | Answer all these questions about your MA and your competitors. Pricing is an observable source so you should be able to get most of the answers. |  |  |  |
| **Strengths** | Complete a SWOT analysis for your MA and your competitors |  |  |  |
| **Weaknesses** |  |  |  |  |
| **Opportunities** |  |  |  |  |
| **Threats** |  |  |  |  |

2. Undertake a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)to better understand your organisation’s current position with regard to resource mobilisation. Strengths and Weaknesses are usually internal to your organisation, while Opportunities and Threats generally relate to external factors.

You can also add other information in this section if relevant eg. Guiding principles, expanded descriptions of challenges, opportunities.

### Table 2. SWOT Analysis

|  |  |
| --- | --- |
| **STRENGTHS** | **WEAKNESSES** |
| * *What does your organisation do well?*
* *What unique resources can you draw on?*
* *What do others see as your strengths?*
 | * *What could your organisation do to improve?*
* *Are there fewer resources than others?*
* *What do others see as your weaknesses?*
 |
|  |  |
| **OPPORTUNITIES** | **THREATS** |
| * *What opportunities are open to your organisation?*
* *What trends could you take advantage of?*
* *How can you turn your strengths into opportunities?*
 | * *What threats could harm your organisation?*
* *What is your competition doing?*
* *What threats do your weaknesses expose you to?*
 |
|  |  |

## Organisational Priorities

From your analysis above, particularly the opportunities section, determine your organisational thematic priorities for your MA. In some instances you will have current capacity, in others you will need to develop some capacity. Hence, this section will also inform your strategies and your resource requirements in Section 5 below and assist you to determine the donors to approach for funding. Sort the opportunities into the following matrix:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **High Priority** | **Medium Priority** | **Low Priority** |
| **Short term** |  |  |  |
| **Medium Term** |  |  |  |
| **Long term** |  |  |  |

# SECTION 3: CURRENT & PAST INCOME

## Summary of Current and Past Income

Analyse your organisation’s income over the **past five years to present**. Present all of your current and recent contracts in a table – see below.

**Consider**:

* How diverse are your funding sources?
* Is your income each year relatively stable or is it inconsistent?
* Did you have a target (the level of income the organisation hoped to bring in)? If so, was the target reached? If not, why might the target not have been reached?
* Where do you think growth can come from?
* Where can you use existing resources better?

### Table 3. Current Donor Income

*Examples are presented in italics in purple font. Present all income in your preferred currency, but ensure all income is in the* ***same*** *currency.*

**Currency =**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Donor** | **Type of Funding** | **Program or****Activity** | **Contract Duration** | **2014 Funding** | **2015 Funding** | **2016 Funding** | **2017 Funding** | **2018 Funding** | ***Notes*** | **Possibility of Renewal or Cost Extension?** |
| ***UNFPA*** | *Restricted* | *SRHRHP Program Sub-Contract, via MoH* | *Jan 2016 – Dec 2018* | *N/A* | *N/A* | *$130,000* | *$120,000* | *$160,000* | *Confusion on cost eligibility, work plan and budgeting process with donor* | *No* |
| ***DFAT*** | *Restricted* | *P4H Program* | *Jan 2015 – Dec 2018* | *N/A* | *$90,000* | *$60,000* | *$90,000* | *$110,000* | *1-year NCE for 2018 due to program underspend* | *No* |
| ***IPPF Core Funding*** | *Unrestricted* | *Annual Core Funding Allocation* | *ANNUAL* | *$105,000* | *$103,000* | *$107,000* | *$106,000* | *$111,000* | *PBF received in 2019* | *Yes - ongoing* |
| ***Income from Government*** |  |  |  |  |  |  |  |  |  |  |
| ***Income from Private sector*** |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| **TOTAL FUNDING** |  |  |  | ***$105,000*** | ***$193,000*** | ***$297,000*** | ***$316,000*** | ***$381,000*** |  |  |

### Table 4. Current Other Sources of Income

*Examples presented in italics. Present all income in your preferred currency, but ensure all income is in the* ***same*** *currency.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Income Type** | **2014 Funding** | **2015 Funding** | **2016 Funding** | **2017 Funding** | **2018 Funding** | ***Notes*** | **Potential income growth area for future?** |
| ***Client fees from clinic*** | *$3,000* | *$3,500* | *$3,000* | *$5,000* | *$4,000* | *Reduction in client registration fees between 2017-18. Need to systematically collect.* | *Yes* |
| ***Board room rental*** | *$1,000* | *$1,000* | *$1,500* | *$1,400* | *$1,500* | *Income received from boardroom rental has remained largely static, despite being rented at full capacity.* | *No* |
| ***Health screening check program*** | *$0* | *$0* | *$0* | *$7,000* | *$18,000* | *Initiative commenced in 2017.* | *Yes* |
| ***Income from government*** | *$5,000* | *$5,000* | *$10,000* | *$10,000* | *$15,000* | *Steadily increasing since gov’t change in 2016.* | *Yes* |
| ***Social enterprise*** |  |  |  |  |  |  |  |
| ***Income from government*** |  |  |  |  |  |  |  |
| ***Income from private sector*** |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| **TOTAL INCOME** | ***$9,000*** | ***$9,500*** | ***$14,500*** | ***$23,400*** | ***$38,500*** |  |  |

# SECTION 4: CURRENT DONOR LANDSCAPE

Which donors are currently active in your country/region? What are their priority areas of support? Do they have specific projects they are funding that might be an opportunity? Consider donors in the following areas: bilateral donors (governments) (eg. DFAT, MFAT, EU, Japan etc); multilateral donors (eg. UN Agencies, Development banks etc); trusts and foundations; Private Sector; commercial consulting firms (downstream opportunities – eg health checks for the Australia and NZ labour mobility programs); others. Include technical areas of interest for the donors. Don’t just consider SRHR but all areas that could provide opportunities for the MA (eg. Health service delivery, SGBV, women’s empowerment, climate change, NCD, menstrual hygiene etc).

**Table 5: Current Donor Information**

|  |  |
| --- | --- |
| **General Donor information** | **Specific opportunity information** |
| **Donor** | **Priority Sectors** | **Priority project opportunities (name or brief description)** | **Implementing Agency** | **Start and end dates** | **New or existing business** | **Contract value** | **Due Date** | **Comments eg. Potential partners, actions required, contacts** |
| ***DFAT*** | *Health, Labour Mobility, Water Supply and Sanitation, Women’s empowerment, Education (tertiary, secondary), climate change,*  | *Pacific Labour Mobility Programme – health checks and SRHR information for deployees overseas* | *Palladium Group* | *2018-2022* | *New* | *Unknown* | *31 Dec 2019* | *Opportunities for MAs include pre-departure health checks for overseas workers. 1000 workers per year, base test cost = USD$75. Requirements include laboratory providing the following tests: XXXXX.* |
| ***EU*** | *GBV, projects in "green" infrastructure, sustainably energy, climate change adaptation, environmental protection, private sector development and improved delivery of social services.* | *Spotlight Programme - GBV* | *UNFPA,*  | *2019/2020* | *New but through existing contract* | *USD**$250,000* | *Under negotiation with UNFPA* | *UNFPA will contract IPPF for spotlight activities through their existing IP agreement with SROP. LFA will be signed between MA and SROP. Main contact: Alex Robinson.* |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

# SECTION 5: PROPOSED APPROACHES GOING FORWARD

Based on analysis of past and current income, as well as projected income moving forwards, present a strategy for future income generation. As far as possible use IPPF’s funding formula to assist in the development of approaches.

**Consider the following:**

* What is the future financial health of the organisation looking like?
* Is the income coming from only a few donors or from a diverse range of sources?
* Are there recurring problems that have prevented the organisation from reaching income generation targets?
* How might the SWOT analysis help identify why there have been issues in generating income?
* Where are the greatest opportunities for growth, and how can the organisation maximise this potential?
* Do we have the qualified and appropriate staff to carry out the approaches that we are planning to undertake?

## Strategy Goal

Outline the overall income strategy goal based on the problems you have outlined above. Be specific with targets if you can (eg. Double MA by end of strategy).

*Example:*

|  |
| --- |
| *Create a more diversified and sustainable income portfolio for the organisation in order to increase our reach and impact on SRHR at national and regional levels.*  |

## Strategy Approaches

Outline the key approaches necessary to achieve the overall goal. Determine who is responsible for driving the activity. Please note that others may need to be involved as well as the main person responsible. Identify priorities eg. high, medium and low; and short term, medium term and long term opportunities.

**Table 6: Strategy Approaches**

*Examples: (Add/amend as appropriate)*

|  |  |  |
| --- | --- | --- |
| APPROACH 1. MAXIMIZE FUNDING WITH EXISTING DONORS |  |  |
| **Sub-Approach** | **Key Actions** | **Responsibility** | **Priority**(short, med, long)(low, med, high) |
| *1.1 Ensure impeccable delivery to secure renewals and cost extensions* | * *Prioritise delivery, management, and oversight of existing programmes.*
 | *Programme Manager* | *Short term/High* |
| *1.2 Position the organisation for new funding from existing donors* | * *Engage in intensive relationship-building and pre-positioning with current donors for new funding.*
* *Aggressively bid on new opportunities as they arise.*
 | *Executive Director* | *Medium term/High* |
| APPROACH 2. DIVERSIFY ORGANISATIONAL INCOME STREAMS |  |  |
| **Sub-Approach** | **Key Actions** |  |  |
| *2.1 Cultivate new and emerging donors* | * *Pre-position with new and emerging donors as a long-term strategy to diversification*
* *Have a designated staff member who scopes for new funding opportunities on a weekly basis*
 |  |  |
| *2.2 Pursue funding for intersectional programming.* | * *Draw on evidence-based strategies that link SRHR to such intersectional issues as gender (including SGBV and LGBTI-related issues), and humanitarian (including climate change), among others. Draw on IPPF Secretariat for support on this as needed.*
* *Partner with organisations in other sectors as relevant for intersectional funding.*
 |  |  |
| APPROACH 3. STRENGTHEN SYSTEMS, PROCESSES AND CAPACITY |  |  |
| **Sub-Approach** | **Key Actions** |  |  |
| *3.1 Collaborate proactively with IPPF secretariat on resource mobilisation opportunities* | * *Explore, assess and respond to potential funding opportunities applicable at country and regional level*
 |  |  |
| *3.2 Clarify income generation approach* | * *Clarify roles and responsibilities for income generation*
* *Agree priority initiatives and activities*
 |  |  |
| *3.3 Implement capacity building activities* | * *Identify capacity building needs for improved resource mobilisation capacity in collaboration with IPPF Secretariat (See 3.1)*
 |  |  |
| *3.4 Strengthen oversight and accountability of all donor funding.* | * *Strengthen financial reporting and management, leveraging support from IPPF Secretariat (See 3.1)*
* *Hold more regular and focused oversight meetings*
 |  |  |
| *3.5 Strengthen organisation’s data collection and reporting systems.* | * *Strengthen financial management and reporting systems with assistance from IPPF Secretariat (See 3.1)*
 |  |  |
| *3.6 Position the organisation as a thought-leader and “go to” organisation in the country* | * *Develop evidence-based theories of change and strategy papers*
* *Build relationships with SRHR and intersectional partner organisations*
* *Invest in strategic communications*
 |  |  |

## Strategy Resource Requirements

Develop a budget for the resources you will need to implement your resource mobilization strategy:

Define who is responsible for what and list of all of the required positions. Budget for what training and capacity building is required for your team members to meet the strategy goals. Include a budget for travel and meetings as staff might need to undertake site visits and donor meetings. Budget for any activities, materials or requirements necessary to position your MA for the identified opportunities. Please use tables 4 and 5 to guide the development of the resource budget.

Please note you could access volunteers for some of the activities so keep that in mind.

# Table 7. Projected Resource Mobilisation Budget

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Resource** | **2019**  | **2020** | **2021**  | **2022** | ***Notes*** | **Potential funding source** |
| **Personnel – list positions separately** |  |  |  |  |  |  |
| **Training** |  |  |  |  |  |  |
| ***Travel*** |  |  |  |  |  |  |
| ***Activities/******Materials*** |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **TOTAL COST** |  |  |  |  |  |  |

# SECTION 6: PROJECTED INCOME

Summarise your organisation’s **projected income** for the next four years. Include both the funding you have **secured** (e.g. donor funded programs with signed contracts) and the income you are expecting (e.g. a pending proposal), i.e. **forecast** income. Present this information in a table.

### Table 8. Projected Donor Income (Secured and Forecast)

*Examples are presented in italics. Present all income in your preferred currency, but ensure all income is in the* ***same*** *currency.*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Donor** | **Type of Funding** | **Program or****Activity** | **Contract Duration** | **2019 Funding** | **2020 Funding** | **2021 Funding** | **2022 Funding** | ***Notes*** | **Likelihood (for forecast income)** |
| **SECURED INCOME** | ***DFAT*** | *Restricted* | *Pacific Strategy Funding* | *Jan 2019 – Dec 2022* | *$90,000* | *$90,000* | *$90,000* | *$90,000* |  | *N/A* |
|  | ***IPPF Core Funding*** | *Unrestricted* | *Annual Core Funding Allocation* | *Jan 2019 – Dec 2019* | *$105,000* | *N/A* | *N/A* | *N/A* |  | *N/A* |
|  | ***Global Fund*** | *Restricted* | *Key Pop’n Project* | *Jan 2019 – Dec 2020* | *$60,000* | *$80,000* | *$0* | *$0* |  |  |
|  | ***TOTAL SECURED FUNDING*** |  |  |  | ***$255,000*** | ***$170,000*** | ***$90,000*** | ***$90,000*** |  |  |
| **FORECAST INCOME** | ***UNFPA*** | *Restricted* | *Transformative Agenda Sub-Contract* | *Oct 2019 – Dec 2022* | *$30,000* | *$60,000* | *$70,000* | *$70,000* | *Annual work plan and budgeting process* | *70%* |
|  | ***IPPF Core Funding*** | *Unrestricted* | *Annual Core Funding Allocation* | *ANNUAL CONTRACTS* | *N/A* | *$105,000* | *$105,000* | *$105,000* | *Core presumed to remain stable.* | *80%* |
|  |  |  |  |  |  |  |  |  |  |  |
|  | **TOTAL FORECAST FUNDING** |  |  |  | ***$30,000*** | ***$165,000*** | ***$175,000*** | ***$175,000*** |  |  |

### Table 9. Projected Other Sources of Income

*Examples presented in italics. Present all forecast income in your preferred currency, but ensure all income is in the* ***same*** *currency.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Forecast Income Type** | **2019 Income** | **2020 Income** | **2021 Income** | **2022 Income** | ***Notes*** |
| ***Client registration fees from clinic*** | *$6,000* | *$7,000* | *$9,000* | *$12,000* | *Assumes forward incremental growth based on additional client registrations and fee system adhered to.* |
| ***Board room rental*** | *$1,500* | *$1,600* | *$1,700* | *$1,800* | *Forward income from rent to remain largely static, but small increases forecast due to rental price adjustments year on year.* |
| ***Health screening check program*** | *$9,000* | *$12,000* | *$15,000* | *$20,000* | *Assumes solid incremental growth for the program based on successful delivery.* |
| ***MoH Contribution*** | *$15,000* | *$20,000* | *$20,000* | *$25,000* | *Assumes stable growth and annual allocations continue by current MoH PS.* |
|  |  |  |  |  |  |
| **TOTAL FORECAST INCOME** | ***$31,500*** | ***$40,600*** | ***$45,700*** | ***$58,800*** |  |

# SECTION 7: MONITOR AND REVIEW

Consider what tools and indicators you will put in place to successfully **monitor** and **evaluate** **success** against the strategy. **Ensure all indicators are tangible and simple enough to assess progress against.**

### Table 10. Measuring Success

*Example indicators and targets presented in italics.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **TARGETS** | **ACTUALS** |  |  |
| **Indicator** | **2018 Baseline** | **2019** | **2020** | **2021** | **2022** | **2019**  | **2020** | **2021** | **2022** | **Status/ Trend** | **Notes** |
| *Number of funding proposals submitted to donors for programs or projects* | *4* | ***5*** | ***6*** | ***7*** | ***8*** | *TBC* | *TBC* | *TBC* | *TBC* | *e.g. on track and ahead of target.* |  |
| *Proportion of proposals successfully awarded vs. rejected (“win rate”)* | *25%* | ***30%*** | ***35%*** | ***35%*** | ***40%*** | *TBC* | *TBC* | *TBC* | *TBC* | *e.g. off track and needs attention/ review* |  |
| *Number of income sources for the organisation (donor or other)* | *3* | ***4*** | ***5*** | ***6*** | ***7*** | *TBC* | *TBC* | *TBC* | *TBC* |  |  |
| *Proportion of total income that is self-generated/earned and not provided by IPPF (sustainability ratio)* | *40%* | ***45%*** | ***50%*** | ***55%*** | ***60%*** | *TBC* | *TBC* | *TBC* | *TBC* |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |

## Implementation of the Resource Mobilisation Strategy

As they say, “a vision without a plan is just a wish”. A clear workplan should be developed for the implementation of your Resource Mobilisation Strategy. The workplan should include key activities that need to be undertaken throughout the period and the activities should be costed into the resource requirements and budget (see Table 4).

The workplan should be a standing agenda item on your team and Board meetings and the subject of a regular organisational review and where possible, responsibilities incorporated into position descriptions or individual and team workplans and monitored on a regular basis.

## Reviewing Your Resource Mobilisation Strategy

Your Resource Mobilisation Strategy should be the subject of a regular organisational review (typically every 12 months), so that it can be updated and modified. Consider when the review will take place and by whom.

**When will the next review take place?**

|  |
| --- |
|  |

**Who will conduct the review?**

|  |
| --- |
|  |

**What has the review found?**

Ask yourselves:

* Is progress towards the goal and success measures being demonstrated? If so, where and how?
* Does the plan need revising?
* Is it too ambitious? Do targets need to be revised?
* Do staff require more help or training?

# ATTACHMENT 1: MA CAPACITY STATEMENT

Attach a copy of your current MA capacity statement (include date developed).