

# RESOURCE MOBILIZATION

## What Is It?

Activities undertaken by an organization to obtain new or additional financial, human and material resources to implement family planning programs and achieve financial sustainability. Diversifying an organization's funding base – from donor funding, corporate sponsorships, charitable contributions, client fees or other sources – can ensure the sustainability of family planning programs.

## What Are the Benefits?

- Can increase local buy-in and financial sustainability of family planning programs
- Reduces the risk of interruption of family planning programs: having multiple sources of funding means if one funding source dissolves, there are others to ensure continued programming
- Can enhance accountability for family planning monies by ensuring that resources committed for family planning (for example, those committed during the London Summits on Family Planning in 2012 and 2017) are used appropriately

### Sustainability vs. Self-Sufficiency

Note the important difference between sustainability and self-sufficiency of organizations or programs. Sustainable programs rely on a combination of earned income (for example, client fees), fundraising (such as donor funds) and public funds (for example, Ministry of Health funding). On the other hand, self-sufficient programs rely solely on earned income, without additional support from donors or public funds. While there are self-sufficient organizations conducting family planning programs in the private sector, the majority of family planning programs and organizations strive for sustainability, and seek funding from a variety of sources.

## How to Implement?

### Domestic Resource Mobilization

Domestic resource mobilization should be a high priority for national family planning programs. Securing domestic resources – whether from the public or private sector – can reduce the reliance on international donor funding and lead to more sustainability over time. At the 2012 London Summit on Family Planning, countries, donors and foundations pledged US\$4.6 billion to help achieve the goal of extending contraceptive access to an additional 120 million women by 2020. Donors and country governments committed even additional funding in the years following and during the 2017 London Summit. It is important for family planning implementers to work with partners (including governmental organizations) to ensure that these committed financial resources are being used in country-level programming.

There are three steps to securing resources domestically for family planning.

### Identifying financing opportunities

Analyze both public and private financing opportunities in your country at the national and sub-national levels.

- **Public-sector sources:** Funding for family planning through internally generated sources such as taxes, fees and levies is generally very low. Where budget lines for family planning do exist, the

resources allocated are most often small and/or underspent. A number of countries are making efforts toward ensuring universal health coverage, which may provide an opportunity to increase domestic family planning resources. Efforts to include family planning in these universal health schemes are critical.

- **Private-sector sources:** The private sector can play a crucial role in ensuring successful family planning programs. For example, you may want to consider partnering with the private sector on [social franchising](#) – that is, the provision of contraceptives in “branded” private facilities. This can help expand the market for contraceptives, particularly among hard-to-reach groups. Consider partnerships with drug shops and pharmacies, which are convenient places for adolescents and others to obtain contraception. You could also work with companies that are interested in providing reproductive health services and family planning to their employees.

## Universal Health Coverage: A Key Opportunity for Family Planning

Many low- and middle-income countries are rolling out universal health coverage programs that allow all their citizens to obtain the health services they need without facing financial hardships. These programs can be provided by the government or may be a combination of private insurance, public services, and/or employer-based coverage. If your country has universal health coverage, inquire whether family planning is included. If so, your program can help educate providers and clients about the included services and make these services more effective. If family planning is not already included, this can be a great opportunity to advocate for coverage of contraceptive services.

## Include family planning in existing financing mechanisms

- Work to include family planning into the existing mechanisms you have identified through targeted national and sub-national [advocacy](#). The outcome could be language within your universal health coverage scheme that specifically states the inclusion of family planning. Additionally, awareness-raising is often important to educate both clients and providers on the coverage of various contraceptive methods under Universal Health Insurance.
- You can also consider performance-based incentives (also called results-based financing or performance-based financing) for family planning in your country or region. These strategies reward health facilities or providers for providing certain services, or patients for demonstrating certain behaviors. For example, antenatal clinics may receive more funding if they offer counseling on postpartum family planning options.
- Advocating for higher levels of domestic support for family planning can also be as “simple” as by providing technical assistance to policy makers to expand domestic allocation and expenditure for family planning by, for example, advocating the addition of line items for contraceptive supplies (and expanded line items, if a line item already exists).

## Track domestic spending levels on family planning

- Once you have advocated for increased domestic spending – including on the programs you implement – you must ensure that the spending is being used appropriately. More on tracking systems to use to hold governments accountable can be found on the [sub-national advocacy page](#).

## International Funding Opportunities

### Research international funding opportunities

- Scan the environment to see what funding opportunities exist. You can find this information on the Internet, at conferences, on social media, and through colleagues. You can research funding



provided by the [S. Government](#), the [Global Fund](#), the [Bill & Melinda Gates Foundation](#) and others. See the list on the [Social and Behavior Change Communication \(SBCC\) Resource Mobilization Implementation Kit](#) (iKit) for ideas of other funding organizations to research.

- Track these opportunities and create a list for consideration. See the SBCC Resource Mobilization iKit for [helpful templates](#) for tracking funders and investors.
- Review the list and determine the high-priority opportunities to pursue, ensuring that the chosen opportunities are in line with your program's goals and objectives.

## Approach funders and investors

- Once you have prioritized your list, you can begin to develop relationships with donors and funders. If the funder has an office in your country (as is often the case with USAID and other bilateral donors), you could request an in-person meeting.
- Whether your meeting is a formal presentation or a more informal meeting, prepare the following information:
  - Your organization/project name, vision and mission
  - The opportunity your organization would like to offer (or currently offers) for which you would like additional funding (make sure to tie this to your vision and mission)
  - How your organization is uniquely positioned and qualified to deliver the proposed opportunity

## Complete a risk assessment and analyze proposal requests

- After reviewing information about potential funding opportunities and approaching potential funders, it is time to determine which opportunities to pursue. Funders often issue Requests for Proposals (RFP), Requests for Application (RFA) or other mechanisms through which you can apply for funding. These requests detail the geographic region, funding amount, timeline and other details of the program they plan to fund.
- In reviewing the various opportunities, it is important to measure the costs and benefits of pursuing each one. A helpful tool for assessing risks can be found on the SBCC Resource Mobilization iKit.
- After deciding to respond to a procurement, it is important for your entire team to read through and analyze the request. You may also want to develop an outline as you review the request.
- As you read the request, pay special attention to the following:
  - Results the funder is seeking
  - Program components
  - Request for key staff
  - Available funding and project duration
  - Deadline for submission
  - Submission requirements
  - Evaluation criteria
  - Other key information and requirements

## Assemble your team and write the proposal

- The first step in managing this process is developing a proposal team. The team should be made up of at least two people, including a budget person and a technical writer. Ideally, a number of other people would also be included on the team, including a proposal manager, a technical/program expert and a recruiting/staffing expert.
- Once your team is in place, you can write your [proposal](#). Most proposals contain the following sections: executive summary; technical approach; work plan and timeline; monitoring and

evaluation; management and staffing plan; capability statement; and cost proposal. See the SBCC Resource Mobilization iKit for [proposal and grant application templates](#).

- It is important to designate at least one reviewer – someone who has not worked on the story – to review your proposal prior to you submitting it to ensure that it is realistic, clear, compelling and well-written. The reviewer ideally would be familiar with the request for proposals and thus could also provide comments on the responsiveness of your proposal to the needs of the funder as outlined in the request.

## Fundraising

### Develop a fundraising plan

- Before beginning to fundraise, it is important to be strategic and develop a detailed, yet straightforward, business plan. An organization that helps nonprofits raise funds, called the Fundraising Authority, publishes Fundraising Basics that can help you think through different ways of raising funds. Another organization dedicated to helping nonprofits, The Society for Nonprofits, has a Fundraising Guide that can also be helpful in this process. The basic steps outlined in the guide are:
  - Identify a fundraising specialist
  - Update your vision and mission statements
  - Assess the world outside your door
  - Assess the world inside your organization
  - Evaluate your programs and services
  - Make your organization more visible
  - Gather descriptive materials
  - Start raising funds
- A fundraising plan template and example can be found on the SBCC Resource Mobilization iKit.

### Write a fundraising proposal

- Fundraising proposals should tell the “story” of your organization and/or program in a compelling way. The story must be persuasive and convincing while also being transparent and sound — back up your statements and assertions with evaluation data whenever possible (hence why evaluating your programs and services prior to fundraising is so important).
- A guide for structuring your fundraising proposal, as well as a fundraising proposal example, can be found on the SBCC Resource Mobilization iKit.

### Hold a fundraising event

Crowdfunding and in-person events are two options to consider when conducting fundraising.

- **Crowdfunding**, primarily done through online platforms, is when an organization raises money from a large number of individuals and/or organizations.
  - [Kickstarter](#) and [GoFundMe](#) are examples of crowdfunding platforms based in North America. Both are easy to use and can be easily shared through social media sites. Other crowdfunding platforms based in other areas of the world include [Thundafund](#), [Startme](#), [Jumpstarter](#) and [FundFind](#), all based in South Africa, and [M-Changa](#), which is based in Kenya. Other countries are also developing similar sites.
  - To develop a successful crowdfunding campaign, review the [tips compiled by FundRazr](#), a crowdfunding platform.

- **In-person events** can also be a great option for fundraising, and in many areas are the most common way to raise funds. You can consider informal or formal dinners, receptions, breakfasts or even sporting events.
  - To ensure a successful event, assemble a committee of staff, stakeholders and others; plan for logistics (location, food/beverages, transportation, etc.); and develop an agenda. You can also determine the invitation list and decide how to send invitations (email, in-person, etc.) and how to target your key audience(s).

Remember to keep in mind the overall goal of the event during the planning process. You may want to have a speaker during the event, or you could have it be more of an informal networking event. You will also need to determine the mechanism for raising funds. Will you charge for admission, accept donations during the event, hold a silent auction, or collect money some other way? Fundraising events often require extensive staff time and resources, so be sure you do not spend more money on the event than the event itself generates!

## What is the Evidence?

Resource mobilization efforts can help secure funding that can, if programmed successfully, increase access to modern contraceptives. When more funding is allocated for family planning, evidence shows that more couples can be reached with lifesaving family planning interventions to help couples determine whether and when they wish to become pregnant. Creative resource mobilization by organizations can open doors to working with new partners and organizations and build organizational capacity to deliver strong programs, enabling organizations to that reach more families, couples and individuals in need of family planning.

### Helpful Tips

- Developing productive partnerships can be an important factor in mobilizing resources for family planning. In addition to country-level partnerships, regional and global partnerships such as the Family Planning 2020 (FP2020) initiative, the Ouagadougou Partnership and the International Conference on Family Planning, can help in this effort. Private-sector partnerships can also be very important.
- Assign at least one person in your program or organization to work on resource mobilization, to monitor funding trends regularly.
- Be open to both formal and informal presentations with potential funders. Train every person in your organization to be able to give at least a short, informal presentation to prospective funders. Making a good impression through informal presentations can lead to more formal invitations later on.
- Send personalized messages after meeting with potential funders. Schedule follow-up meetings (in person if possible), and provide additional details as needed.
- Ensure funding opportunities align with your organization's mission, your geographic region(s) of focus and your technical area before investing in resources to pursue the opportunity. Also consider the likelihood that the funding would lead to new opportunities or additional funding.
- Make sure your vision and mission statement are up to date and that you can succinctly describe your organization/project before you begin the process of fundraising or proposal writing.
- Make sure your fundraising proposals are written clearly, and avoid jargon. Those evaluating your proposal may not all be technical experts, so try to write for a lay audience.

## ! Challenges

- It can be difficult to prioritize the funding opportunities to pursue. Using the risk assessment tool can be helpful.
- When staff members have other responsibilities, it can be difficult to make time for resource mobilization efforts. Consider assigning this task to someone on the team, or if current funding allows hiring a resource mobilization specialist.
- Pulling proposals together can take considerable time and effort. You can develop some of the basic information that is common to most proposals, such as capability statements, evaluation reports and communication materials, ahead of time. Then you can add specific information to tailor the proposal for the particular funder/award as the time arises.

## External Resources

- [SBCC Resource Mobilization Implementation Kit](#)
- [Society for Nonprofits Fundraising Guide](#)
- [Resource Center Fundraising Strategy](#)
- [The Fundraising Authority's Fundraising Basics](#)
- [Opportunity Fund for FP2020](#)
- [Economics and Ethics of Results-Based Financing for Family Planning: Evidence and Policy Implications](#)