



# Mobilization resources for civil society organizations in a digital context

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## Session 1: Financing based on clear criteria for a strategic "yes"

2025



Mobilizing resources for civil society organizations in  
a digital context



**Funding based on clear criteria for a  
strategic "yes"**

# Slide showing the sessions and where we are

## Session #1

Design, implement, and refine a strategic screen to align organizational decisions with key objectives and priorities, ensuring that the tool is dynamic and adaptable.

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2/3

## Sessions 2 and 3

Connect to make an impact:  
Keys to success with donors and proposals

## Session 4

Artificial intelligence for resource mobilization

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## Session 5

Decoding communications:  
How to create a plan that connects, motivates, and inspires

## Session 6

Strategy in action:  
Developing a resource mobilization plan

6

## Session 1: Objectives

# At the end of this session, participants will be able to

- ✓ Justify the implementation of a strategic screen by assessing its potential impact on the organization's effectiveness and direction.
- ✓ Select and justify 5 to 7 essential decision criteria, distinguishing between those that are indispensable and those that are desirable in the organizational context.
- ✓ Assess the strategic importance of weighting criteria as a reflection of the organization's priorities and direction.
- ✓ Design a first draft of the strategic screen, combining the selected criteria and their weighting in a functional scoring tool.
- ✓ Formulate an action plan to test, validate, and refine the strategic screen, ensuring its evolution as a "living tool."

# What are we going to see today?



## The challenge

The challenges facing  
NGOs



## The strategic screen

Earning more by doing less



## Defining criteria

Brainstorming

# What are we going to see today?



## Assign weightings

Strategic prioritization



## Objective rating

All that glitters is not gold



## Putting it into practice

Design and examples



**What organizational obstacles do you encounter when seeking new funding opportunities?**



# Many complications when mobilizing resources?



**Pursuit of every opportunity?**



**Lack of time/staff for strategic analysis?**



**Are proposals being rushed?**

# The solution: the strategy screen

- A simple, objective framework facilitates decision-making.
- Aligning efforts with the mission saves time and energy.
- Clear and objective criteria help focus resources.



# Key benefit: earn more by doing less

- Focus on high-potential opportunities.
- Make informed, strategic decisions.
- **Don't get involved in something you can't afford to lose.**

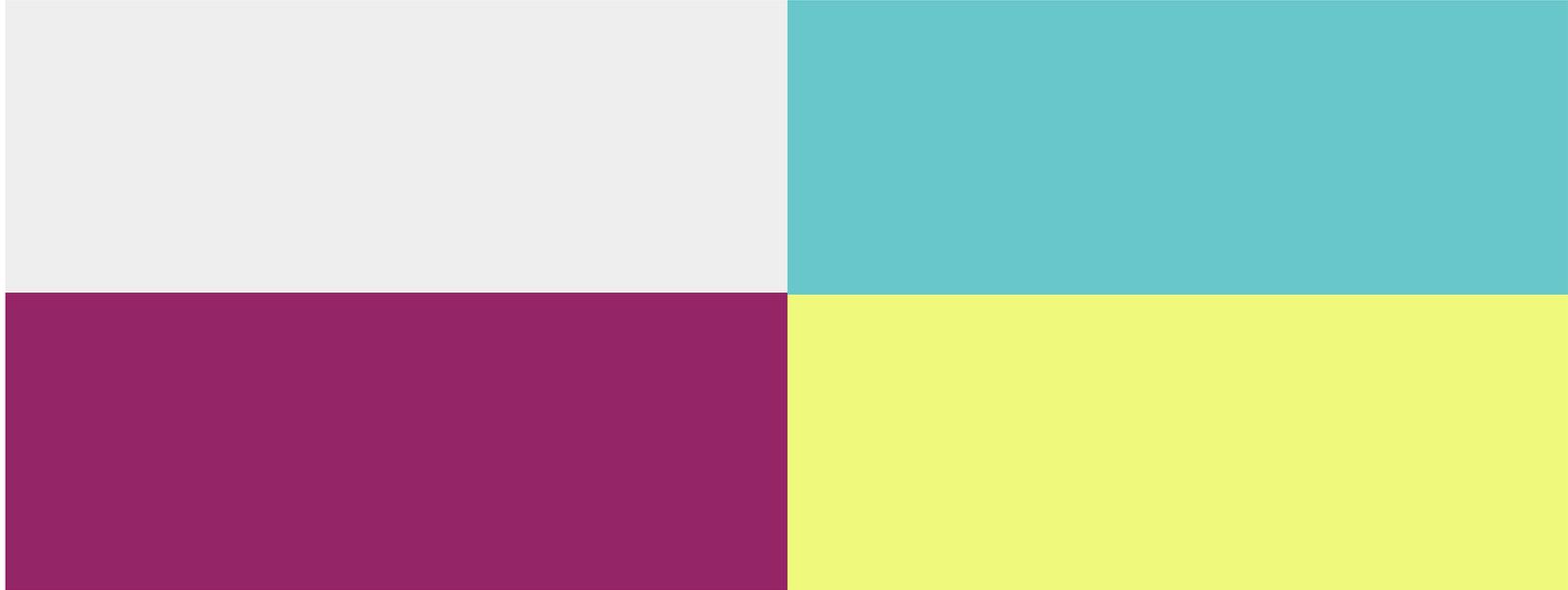




# What is most important? Define your criteria

- Brainstorming: what is crucial for YOUR organization?
- Select 5 to 7 key criteria.
- Examples: alignment with mission, budget size, donor history, likelihood of winning.
- Start by thinking carefully about who should help you define the criteria.

# Group exercise: brainstorming and prioritizing criteria



# Assign weights: not all criteria are equal

- Distribute 100% among the criteria you have chosen.
- Reflect your organization's priorities.
- Example: alignment with mission (25%), budget adequacy (25%), likelihood of success (25%), strategic alliances (10%), donor reputation (10%), future potential (5%).



# The final product: strategy screen in action



CRITÈRES	POIDS (%)	SCORE POSSIBLE (Points Max)	SCORE DE L'OPPORTUNITÉ (Points Attribués)	COMMENTAIRES
Alignement avec les Priorités Stratégiques Mondiales	25%	5		C'est une priorité absolue pour l'impact global de notre organisation. (25% de 20 = 5 points max)
Forte Chance de Gagner (Basée sur l'expérience passée et l'adéquation)	25%	5		Nous devons être réalistes quant à nos chances compte tenu de la concurrence et de notre capacité. (25% de 20 = 5 points max)
Montant du Budget Suffisant pour Couvrir les Coûts et Offrir une Qualité	25%	5		Nous devons nous assurer que le financement permet une mise en œuvre efficace et ne crée pas de contrainte financière. (25% de 20 = 5 points max)
Opportunité de Partenariats Locaux Significatifs	10%	2		La collaboration renforce notre travail et promeut l'appropriation locale. (10% de 20 = 2 points max)
Bailleur de Fonds avec une Histoire et une Réputation Positives	10%	2		Travailler avec des bailleurs de fonds fiables et éthiques est crucial pour une expérience positive. (10% de 20 = 2 points max)
Potentiel de Financement Futur ou d'Expansion	5%	1		Bien que ce ne soit pas la priorité la plus élevée, les opportunités de croissance sont précieuses. (5% de 20 = 1 point max)
<b>TOTAL</b>	<b>100%</b>	<b>20</b>		Le score total de l'opportunité sera la somme des points attribués pour chaque critère.



## **Group exercise: weighting your criteria and drafting a screen design**



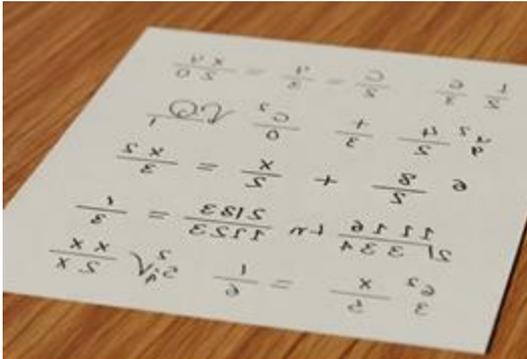


## Group exercise: weighting your criteria and drafting a screen design



1. Compatibility with the **mission 10%**
2. The opportunity that this funding will bring us **30%**
3. The donor's political orientation **20%**
4. The real impact of the funding on the target population **30%**
5. The quality of the administrative procedures involved in submitting our **funding application 10%**

# Evaluate opportunities: objective assessment



**Use a simple scale (e.g., 20 points in total).**



**Calculate based on weightings.**



**Evaluate them using a structured and clear approach.**

# Put it into practice: test, monitor, adjust

## Winning tips

- "Prototype mindset": start simple, test v old bids.
- Use it consistently (15 to 20 minutes per opportunity).
- Track decisions and results.
- Ask for feedback (whether you win or lo
- A living tool. It must be tested, adapted, improved.



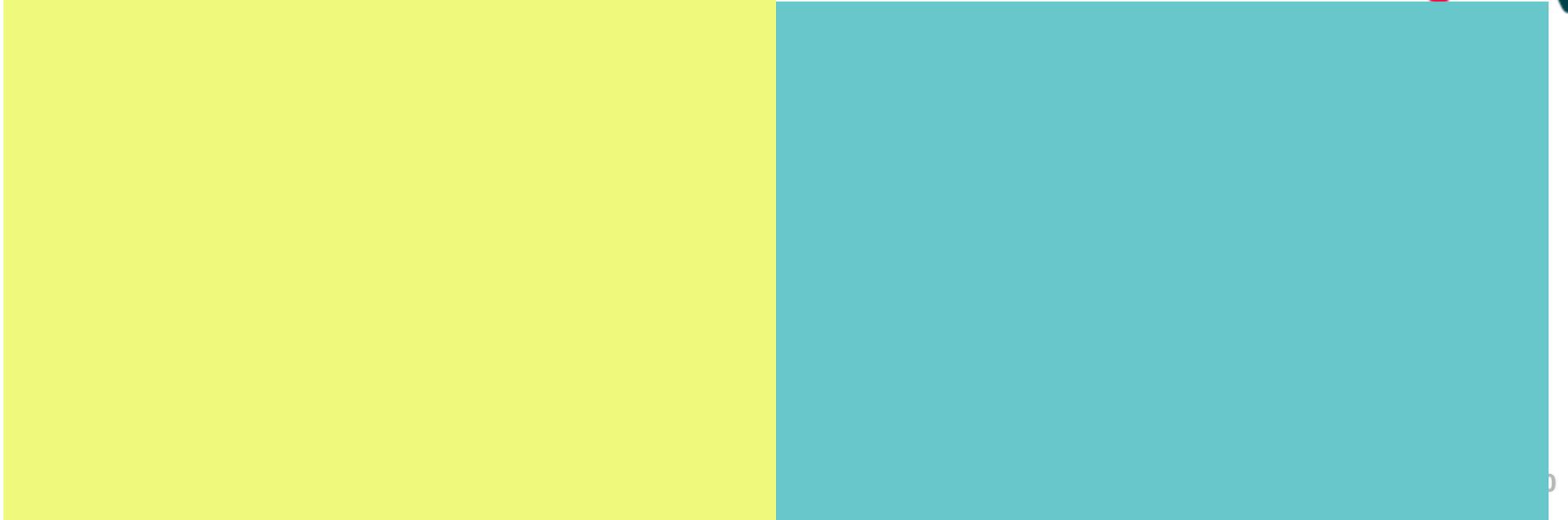


**Quickly evaluate  
a request for  
proposal/RFP  
using your  
strategic screen**





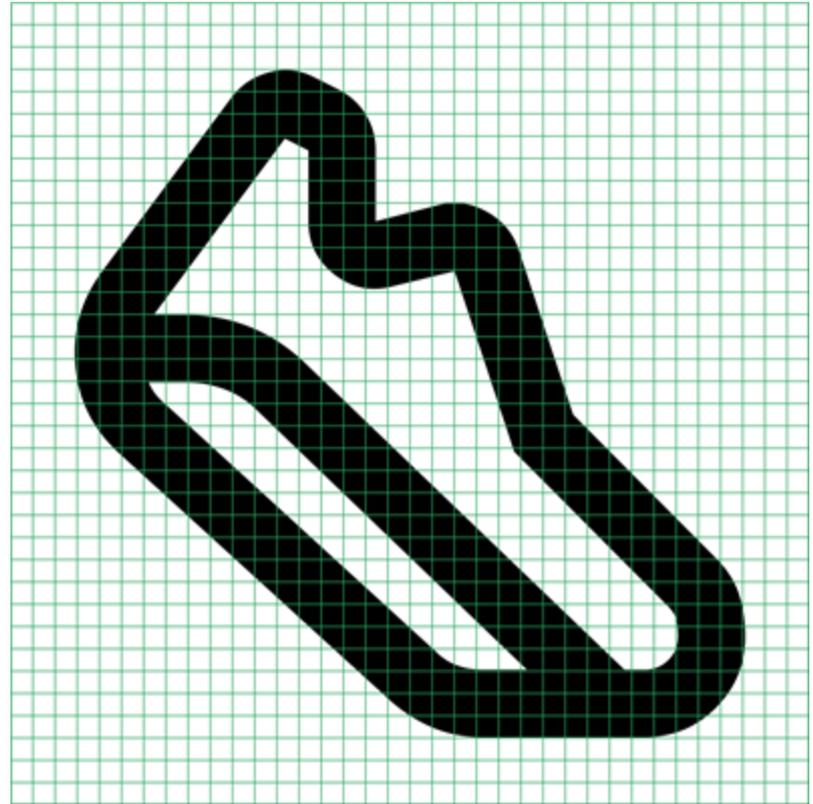
# Quickly evaluate a bid using your strategic screen



# What now? Next steps

1. Form a small team within your organization to refine your screen design.
2. Test it retroactively.
3. Start using it!

Questions and answers



# Thank you!



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