



Mobilizing resources for civil society organizations in a digital context

Session 6 Strategy in action: Developing a resource mobilization plan

2025



Mobilizing resources for civil society organizations in a digital context



Consolidate our tools

We will develop an action plan for our organizations

Slide of the s and where we are going

No. 1

Targeted funding
Clear criteria for a
strategic "yes"

1

2/3

No. 4

Artificial intelligence for
resource mobilization

4

No. 2 and No. 3

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

5

No. 5

Communications decoded:
How to create a plan that
connects, motivates, and inspires

No. 6

Turn the analysis of a new
strategic opportunity into
a concrete, priority action
plan for your organization.

6

No. 6:

Objectives of these

- ✓ Analyze the strategic alignment of a new opportunity, distinguishing its potential benefits and risks for the organization.
- ✓ Assess the internal capacity of the organization, determining which existing systems need to be adapted and which new capabilities need to be created.
- ✓ Develop a priority action plan that synthesizes the team's analysis into a sequence of concrete tasks.
- ✓ Apply this collaborative strategic planning framework to the organization's future challenges.

Rule No. 1 for the success of this strategy



A safe and creative space

Other rules for the success of this exercise

- **Every voice counts:** there are no bad ideas in a brainstorming session.
- **Be present and participate:** let's minimize distractions and focus.
- **Challenge ideas, not people:** we discuss strategies, we don't attack each other.
- **Listen to understand:** hear all points of view before drawing conclusions.
- **Can-do attitude:** our goal is to come up with a concrete plan, not just a discussion.

The 4-quadrant strategic framework

A simple tool for effective decisions

Why should we move forward?

Why

Why take a step back?

What do we need to adapt or adjust?

The how

What should we create or prototype?

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Quadrant 1 - the "benefits"

Why should we move forward?

The question: What are all the benefits, opportunities, and positive outcomes associated with seeking support from the Gates Foundation?

- Consider:
 - Alignment with our mission
 - Scale of funding
 - Validation and credibility
 - Access to networks and expertise
 - Opportunities for innovation

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Quadrant 2 - Devil's advocate

Why should we back down?

The question: What are the risks, challenges, and reasons to be cautious?

- Consider:
 - Lack of alignment of priorities
 - Very strict reporting requirements
 - Risk of straying from our mission
 - Competition for funds
 - Pressure on our internal resources

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Quadrant 3 - Adapt what we have

What do we need to adapt?

The question: if we move forward, what existing systems, skills, and processes should we change?

- Consider:
 - Our financial monitoring systems
 - Our monitoring and evaluation processes
 - Staff roles and responsibilities
 - Our current communications strategy
 - Our proposal writing process

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What should we create or prototype?

Quadrant 4 - Create what we need

What do we need to create?

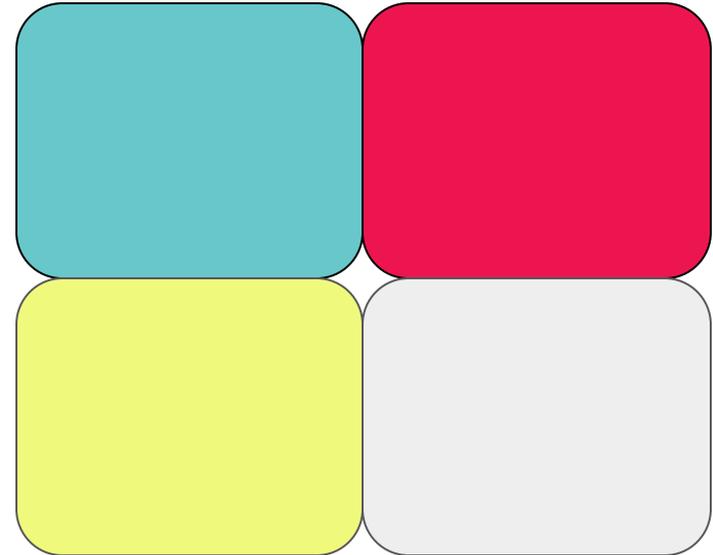
The question: What is completely missing? What new things should we build from scratch?

- Things to consider:
 - New positions (e.g., grants manager)
 - A new donor management system (CRM)
 - A document entitled "Gates Approach Strategy"
 - New program prototypes to test
 - New reporting templates

From ideas to action

Developing our short-term action plan

Action/Task (from quadrants 3 and 4)	Responsible	Deadline	Priority
<i>Example: research Gates' M&E requirements</i>	<i>Sara</i>	<i>September 30</i>	<i>High</i>
<i>e.g., adapt the budget template</i>	<i>Finance team</i>	<i>Oct. 15</i>	<i>High</i>
<i>e.g., Create a one-page concept note.</i>	<i>Management</i>	<i>Nov. 1</i>	<i>Medium</i>
<i>e.g., Write a job profile</i>	<i>Aisha</i>	<i>Oct. 30</i>	<i>Low</i>



We have a plan!

Congratulations! We did it:

Analyze a strategic opportunity from multiple angles.

Identify the changes and tools needed.

Create a short-term priority action plan with clearly identified responsible parties.

Now what?

Integrate this tool into your organizations and implement it for your most urgent initiatives



Thank you!



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 **Facilitator:** Camilo Forero

 **Module creator:** Camilo Forero