Resource
Mobilization for
Civil Society
Organizations
in a Digital Context

Session #6

Strategy in Action

Developing a Resource Mobilization Plan

2025

1. Introduction

This workshop, "Strategy in Action," is designed for leaders and teams from civil society organizations facing complex strategic decisions. Often, organizations feel overwhelmed by opportunities and challenges, which can lead to paralysis by analysis or to making decisions without a clear framework, spending valuable resources on initiatives that are not fully aligned with their mission or capacity.

The goal of this session is to equip participants with a visual and collaborative tool, the 4 Quadrant Strategic Framework, to break down any strategic initiative in a systematic way. The guiding principle is to move from discussion to action in a structured way.

During the hands-on session, participants will learn a process to:

- Analyze an opportunity from the dual perspective of its benefits ("Why should we?") and its risks ("Why take a step back?").
- Assess the internal capacity of the organization, identifying which existing resources need to be adapted and which new capacities need to be created.
- Synthesize this analysis into a concrete, prioritized action plan with clear responsibilities.

By the end of the workshop, the team will not only have made an informed decision about the initiative in question, but will also have acquired a replicable method for future strategic challenges.

Session Script Session #6 Strategy in Action: Developing a Resource Mobilization Plan

Minute	Slide number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
0-5	1-4	**Welcome and Objectives.** Project Slide 1 (Title). "Welcome to 'Strategy in Action.'" Use Slide 3 to read the consolidated overall objective. Use Slide 4 to detail the learning objectives.	Purpose and benefits of the 4-quadrant framework for decision-making.	Explanation + visual, establishing purpose.	Reaffirm how the session will move from "idea" to "concrete action plan." Connect the objectives to a tangible outcome for the team.
5-10	5-6	**Establish a Safe Space.** Use Slides 5 and 6 to review the rules of the session. "For this to work, we need an open and honest conversation. There are no bad ideas today."	Importance of psychological safety for honest brainstorming and the expression of constructive disagreements.	Create a group contract or agreement.	Frame these rules not as an imposition, but as a mutual agreement for the success of the session.

Minute	Slide number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
10-15	7	**Introduce the Strategic Framework.** Explain the logic of the 4-quadrant framework. "This map will guide us. First, we focus on the 'Why' (upper quadrants) and then on the 'How' (lower quadrants)."	Framework logic: Opportunity analysis (Why) followed by execution planning (How).	Conceptual + visual presentation.	Use the map metaphor to simplify the process. "Before planning the route (the How), we need to be sure of the destination (the Why)."
15-30	8-9	**Quadrant 1: The "Pros" + Activity.** Explain Quadrant 1: "Why should we move forward?" Launch **Activity #1**. "Let's think about all the benefits and opportunities."	Brainstorming of benefits and strategic alignment.	Brainstorming, individual work followed by sharing.	Encourage the group to think expansively. Capture all ideas without judging them.
30-45	10-11	**Quadrant 2: Devil's Advocate + Activity.** Explain Quadrant 2: "Why take a step back?" Launch **Activity #2**. "Now, let's be devil's advocates. This is crucial for anticipating risks."	Risk analysis, critical thinking, consideration of counterarguments.	Brainstorming, divergent thinking.	Reassure the group that the goal is not to kill the idea, but to strengthen it by identifying and anticipating challenges.
45-60	12	**Quadrant 3: Adapt what we have + Activity.** Explain Quadrant 3: "What should we adapt?" Launch **Activity #3**. "We have explored the 'why.' Now let's move on to the 'how.' What do we already have that needs to change?"	Assessment of existing resources and capabilities. Analysis of operational gaps.	Group discussion, practical application.	At this point, the energy shifts from deliberation to planning. The tone is more practical and solution-oriented.
60-75	14-15	**Quadrant 4: Create What We Need + Activity.** Explain Quadrant 4: "What do we need to create?" Launch **Activity #4**. "Finally, what are we completely missing? What needs to be built from scratch?"	Identification of new needs (resources, personnel, systems).	Creative problem solving.	Encourage the group to be creative but realistic about what is needed to build the initiative's success.

Minute	Slide number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
75-85	16	**Build the Action Plan.** Project the table from Slide 16. "Excellent work. Now let's turn this analysis into action." Facilitate filling in the table using the ideas from quadrants 3 and 4.	Synthesis, prioritization, assignment of responsibilities, and deadlines (accountability).	Convergent thinking, strategic planning.	This is the most important part. Ask questions such as: "What is the first domino that must fall?" or "What action unlocks the others?" to help prioritize.
85-95	17-19	**Closing and Next Steps.** Project Slide 17. Summarize the achievements: "We have created a clear action plan." Explain the next steps with Slide 18 and thank the team.	N/A	Closing, summary, call to action.	End on a high note, celebrating the collaborative work and reinforcing that the team now has a clear path forward.

Appendix 1: Activities

Activity #1: Brainstorming the "Pros" (Quadrant 1)

- **Objective:** To generate a comprehensive list of all the reasons, benefits, and opportunities that would make the initiative positive for the organization.
- **Time:** 15 minutes.
- **Tools:** Whiteboard or flipchart, sticky notes (post-its) and markers, or a shared digital board (such as Miro) that allows the use of virtual sticky notes.
- **Instructions for the facilitator:**
    1. (5 min) Individual brainstorming: Ask each participant to silently write on sticky notes (physical or virtual) all the reasons why the initiative is a good idea (one idea per note). Encourage them to think big and small.
    2. (10 min) Sharing: Ask each person to take turns reading one of their ideas aloud and sticking it in Quadrant 1 on the whiteboard or digital board. Group similar topics as they arise to visualize patterns. Continue until all ideas have been shared.

Activity #2: Playing Devil's Advocate (Quadrant 2)

- **Objective:** To identify all the risks, challenges, and reasons to be cautious about the initiative.
- **Time:** 15 minutes.
- **Tools:** Whiteboard or flipchart, sticky notes (post-its) and markers, or a shared digital board (such as Miro) that allows the use of virtual sticky notes.
- **Instructions for the facilitator:**
    1. (5 min) Individual brainstorming: Again, ask participants to individually write down all possible negative aspects, risks, or challenges on sticky notes (physical or virtual).
    2. (10 min) Sharing: Repeat the process of sharing aloud and sticking the notes in Quadrant 2. Reinforce that this is an exercise in "preparation," not "pessimism," and that each risk identified is an opportunity for planning.

Activity #3: Identifying Necessary Adaptations (Quadrant 3)

- **Objective:** Determine which existing systems, processes, skills, or resources in the organization would need to be modified to implement the initiative.
- Time: 15 minutes.
- **Tools:** Whiteboard or flipchart and markers, or a shared digital board (such as Miro) where the facilitator can write down ideas directly.
- **Instructions for the facilitator:**
    1. Open group discussion: Switch from the sticky note format to a group conversation.
    2. Ask the group: "Assuming we move forward, let's look within our organization. What current processes would we need to adjust? What roles would need to change? What tools would need to be updated?"
    3. Write down the answers directly in Quadrant 3 of the whiteboard or digital board, encouraging dialogue and building on each other's ideas.

Activity #4: Brainstorming What Needs to Be Created (Quadrant 4)

- **Objective:** List all new resources, systems, roles, or strategies that would need to be created from scratch.
- **Time:** 15 minutes.
- **Tools:** Whiteboard or flipchart and markers, or a shared digital board (such as Miro) where the facilitator can write down ideas directly.
- **Instructions for the facilitator:**
    1. Continue the group discussion: Maintain the conversation format.
    2. Ask the group: "We've seen what needs to be adapted. Now, what do we simply not have? What do we need to build from scratch to make this work? A new position? A new policy? A new strategic alliance?"
    3. Write down the answers directly in Quadrant 4, capturing all the "missing pieces" that the team identifies.

Appendix 2: Workshop Summary Sheet

Strategy in Action: 4 Quadrants Template for Decision Making

A short guide to transforming collaborative analysis into a concrete plan.

The Purpose: This visual, collaborative tool helps your team systematically analyze any new initiative (from seeking a new donor to launching a program), make informed decisions, and create a clear action plan. The goal is to move from discussion to action in a structured way.

The Strategic Initiative to Evaluate: *(Write here the key question that will guide the session. E.g.: Should we seek funding from Foundation X? Should we implement a new AI strategy?)*

The Analysis Framework: The 4 Quadrants

(Use a whiteboard or digital board (Miro) to draw this quadrant and fill it in with the team).

WHY	
Quadrant 1: Why Should We? (The Pros) *What benefits does it bring? How does it align with our mission? What opportunities does it open up? What are the quick wins?* *Brainstorm all the positives...*	**Quadrant 2: Why Take a Step Back? (The Cons)** *What are the risks? What challenges does it present (financial, capacity)? Could it distract us from our mission?* *Be "devil's advocates." Anticipate obstacles...*
THE HOW	
Quadrant 3: What should we ADAPT? (Existing Resources) *What current systems, processes, or roles would need to change? What team skills need to be strengthened or refocused?* *Focus on modifying what you already have...*	**Quadrant 4: What should we CREATE? (New Resources)** *What is completely missing? What new roles, tools, policies, or strategies do we need to build from scratch? What prototypes can we develop?* *Focus on building what does not exist...*

From Discussion to Action Plan

Once the quadrants are complete, use the ideas from quadrants 3 ("Adapt") and 4 ("Create") to fill in the table below. Prioritize together which actions are most urgent and important.

Specific Action	Responsible	Deadline	Priority (High/Medium/Low)

Keys to a Successful Session

- **Involve Diverse Voices:** Invite people from different areas and levels of the organization. Diversity of perspectives prevents groupthink and enriches the analysis.
- **Create a Safe Space:** Establish from the outset that all ideas are welcome, both novel ideas and constructive criticism of what already exists. Encourage debate about ideas, not people. The use of anonymous sticky notes at the beginning can help.
- **Neutral Facilitation:** The facilitator should guide the process, not influence the content. Their role is to ask questions, ensure everyone participates, and keep the conversation focused.
- **Focus on Action:** The ultimate goal is not just to have an interesting discussion, but to create a clear and executable plan. Ensure that each action item is specific and has an assigned owner.