USAID/Accelerating Support to Advanced Local Partners

Business Development

Components of a resource mobilization strategy, identifying resources, submitting competitive proposals, and budgets

Presented By: Pact’s Business Development Director, Kimberly Riddle
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Agenda

• Introductions
• **Part 1:** Components of a Resource Mobilization Strategy
• **Part 2:** Identifying Resources
• **Part 3:** Submitting competitive proposals and budgets
• Key Takeaways
• Questions
Part 1: Components of a Resource Mobilization Strategy

This section builds on the NPI Resource Development Training, June 2010
Key questions to answer before developing a resource mobilization strategy

<table>
<thead>
<tr>
<th>Question</th>
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<tbody>
<tr>
<td>Does your organization have a strategic plan?</td>
</tr>
<tr>
<td>What are the primary hurdles you face in securing funding?</td>
</tr>
<tr>
<td>Who do you consider part of your resource mobilization network?</td>
</tr>
<tr>
<td>What are your top 3 goals for developing this strategy?</td>
</tr>
</tbody>
</table>
Resource Mobilization Process

1. Identify Needs (linked to strategic plan)
2. Map Funding
3. Develop RM Strategy
4. Evaluate
Donor Mapping: Get to know your funder

• Review their country strategies and determine alignment with your organization’s priorities

• Find out in-country point of contact (POCs) and ask for introductory conversations and meetings

Donor Mapping: When to Approach the Donor

- What the donor wants
- What the situation requires
- What your organization can offer
Donor Mapping: How to Engage Them

• Begin with the end in mind
• Know your audience
• Keep the interests of the donor in mind
• Leave critical information behind
<table>
<thead>
<tr>
<th>Objectives</th>
<th>Resources required</th>
<th>Potential Donors/other sources of funding</th>
<th>Funding Gap</th>
<th>Actions required to raise the resources</th>
<th>Responsible Parties</th>
<th>Timeframe</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are we trying to achieve?</td>
<td>What do we need to accomplish our goal?</td>
<td>Where will the resources come from?</td>
<td>What or who do we need to know that we don’t know now (info / access)?</td>
<td>What are the steps required to secure the resources?</td>
<td>Who will do what, specifically?</td>
<td>When will each step happen? When are the resources needed?</td>
<td>What internal or external factors will we need to consider?</td>
</tr>
</tbody>
</table>
Part 1: Question Break
Part 2: Identifying Resources
What are resources?

<table>
<thead>
<tr>
<th>Human</th>
<th>Physical</th>
<th>Social or Political</th>
<th>Financial</th>
<th>Natural Advantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Skills</td>
<td>• Facilities</td>
<td>• Partnerships</td>
<td>• Money</td>
<td>• Location</td>
</tr>
<tr>
<td>• Experience</td>
<td>• Equipment</td>
<td>• Good will</td>
<td>• Unrestricted Funding</td>
<td>• Natural Resources</td>
</tr>
<tr>
<td>• Ideas</td>
<td>• Materials</td>
<td>• Reputation</td>
<td>• Access to credit</td>
<td>• Fertile Land</td>
</tr>
<tr>
<td></td>
<td>• Tools</td>
<td>• Favorable policies</td>
<td>• Revenue from business activity</td>
<td></td>
</tr>
</tbody>
</table>
In a sustainable organization, **everyone** is responsible for resource mobilization.
Roles and Responsibilities for RM

Example: Board of Directors

- Participate in developing a strategic plan that sets objectives and priorities of the organization and costs them
- Draft resource mobilization objectives and plan
- Draft proposals for review and approval by the board
- Mobilize and retain human resources
- Implement the resource mobilization plan
- Report to board, donors and stakeholders on the progress of the plan and use of resources
External Resources- Funding

- **USAID Partners**: This describes the role of USAID’s partners and provides a link to [USASpending.gov](https://USASpending.gov), a searchable database of USAID’s most recent awards.
  - Quarterly forecast Q+As are a great opportunity to get feedback from USAID on upcoming procurements
- **WorkWithUSAID**: A resource hub for local and international organizations to navigate working with USAID.
- Grants: Grants.gov
- Contracts: Sam.gov

*Sources: [https://www.usaid.gov/work-usaid/resources-for-partners](https://www.usaid.gov/work-usaid/resources-for-partners)*
Example from USAID Forecast

When to expect the opportunity to be released

Review the change log to see what updates have been made so you can track over time

<table>
<thead>
<tr>
<th>Date and Time</th>
<th>Updates</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/26/2021 11:02 PM EST</td>
<td>Changed Anticipated Award Date to 07/18/2022 from 06/18/2022</td>
</tr>
<tr>
<td>07/26/2021 12:05 PM EST</td>
<td>Changed Eligibility Criteria to N/A from TBD</td>
</tr>
<tr>
<td></td>
<td>Changed Category Management Contract Vehicle to N/A from TBD</td>
</tr>
<tr>
<td></td>
<td>Changed Anticipated Solicitation Release Date to 07/18/2022 from 12/13/2021</td>
</tr>
<tr>
<td></td>
<td>Changed Award/Action Type to Cooperative Agreement from TBD to TBD</td>
</tr>
<tr>
<td>07/14/2021 06:18 AM EST</td>
<td>Added Principal Geographic Code 901 - Worldwide (Including Cooperating Country)</td>
</tr>
<tr>
<td></td>
<td>Removed Principal Geographic Code TBD</td>
</tr>
<tr>
<td>03/09/2021 09:21 AM EST</td>
<td>Added Co-creation TBD</td>
</tr>
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</table>
Additional Resources

• **Branding and Marking** and **USAID Style Guide**: These two guides illustrate how to use USAID’s identity in your programs and delineate USAID's style and language preferences and guidelines.

• **Indirect Cost Rate Guide for Nonprofit Organizations**: This explains the requirements for the determination of indirect cost rates for application on cost reimbursable grants and other agreements awarded by USAID.

• **Compliance**: This discusses USAID’s Compliance Division, including information on reporting compliance concerns. USAID is dedicated to upholding the integrity of our foreign assistance efforts—and the taxpayer funds entrusted to us—to build a free, peaceful, and prosperous world.

• **Training Series on How to Work with USAID**

Sources: https://www.usaid.gov/work-usaid/resources-for-partners
Part 2: Question Break
Part 3: Submitting competitive proposals and budgets
Why Processes?

• Streamline coordination
• Keep people informed
• Get adequate support
• Ensure quality and compliance
• Knowledge management
Key Steps in Proposal Development

The RFA is released, what next?

• Assemble the team and outline roles and responsibilities
• Develop a calendar and compliance matrix
  • Key dates:
    • Kick off meeting
    • Design sessions
    • Pink Team: Ensures technical design is on track early in the process
    • Red Team: Provides final technical feedback from donor’s perspective
    • Lime and Green Teams: Provide feedback on the cost proposal and budget narrative from donor’s perspective
Key Steps in Proposal Development

Understand the donor’s requirements

• Review the solicitation carefully
• Take advantage of the Q+A
• Compliance is key

Additional Resources: USAID NPI Quick Reference- Responding to a Funding Opportunity
Key Steps in Proposal Development

Technical Design

• Do your research

• Hold design meetings/workshops

• Seek input from people outside the core group

• Outline your vision and approach, develop detailed activities, and do a draft work plan
Key Steps in Proposal Development

Cost Proposal

• Early Engagement
• Competitive Pricing
• Follow instructions
• Ensure consistency
Key Steps in Proposal Development

**Budget Notes**

• Opportunity to be competitive: Best Value Statement/Cost Effectiveness/Highlight your organization’s added value

• Budget should be linked to the technical content

• Mirror solicitation and budget

• **Justify and explain** costs and assumptions

• Avoid putting too many numbers

• List costs that will require exceptions or waivers from the donor (e.g. TCN allowances, international travel, etc.)

• Subgrantees/subcontractors also need to document their costs (this goes for the budget as well).
Helpful templates to consider

- Corporate capabilities statement
- Budget template with budget notes
- Updated staff CVs
- Monitoring, Evaluation, and Learning (MEL) Approach
- Management Approach (if you are planning to prime)
- Past performance examples
QUESTIONS?
The USAID/ASAP website hosts many recorded webinars and resources. www.intrahealth.org/asap-resources
THANK YOU FOR ATTENDING.