USAID/Accelerating Support to Advanced Local Partners
## WEBINAR SERIES

BUSINESS DEVELOPMENT

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

September 1, 2021

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1. Welcome Local Partners

2. Please use the Q&A box for any questions.

3. We have one poll during the webinar today.

4. The presentation for today's webinar will be emailed to attendees and saved on ASAP's website at **www.intrahealth.org/asap-resources**
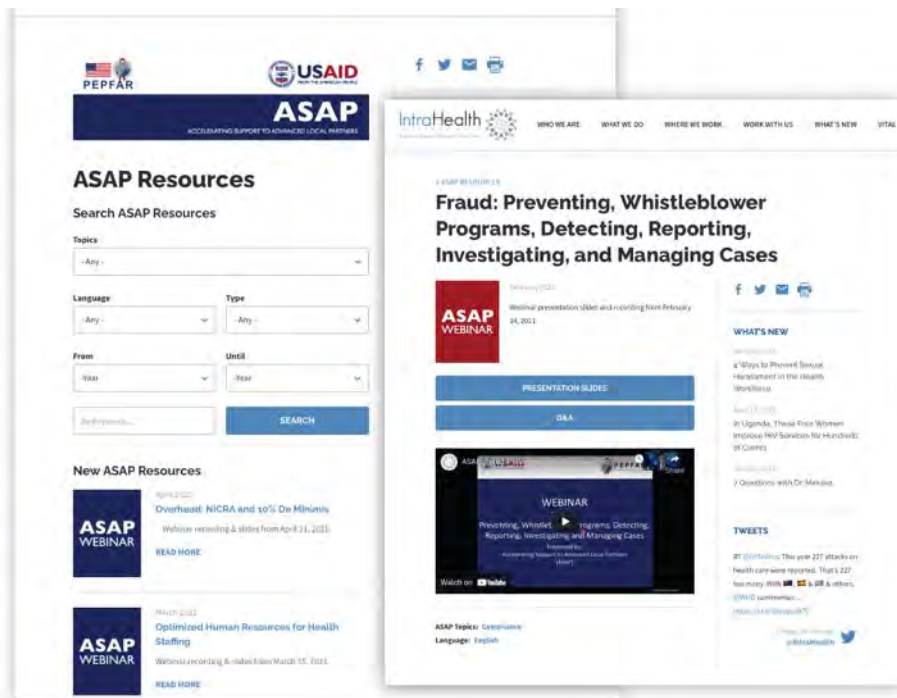
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WEBINAR SERIES

BUSINESS DEVELOPMENT

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

September 1, 2021

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

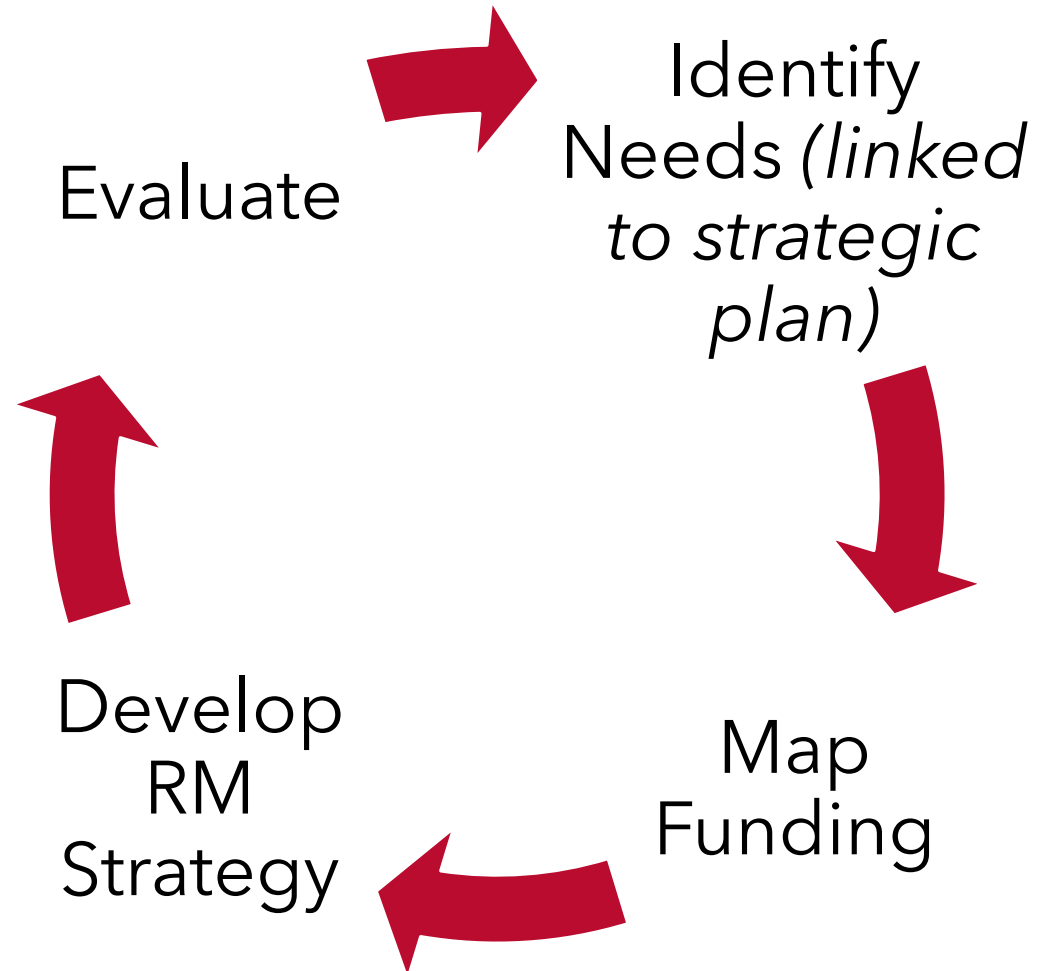# Key questions to answer before developing a resource mobilization strategy

Does your organization have a strategic plan?

What are the primary hurdles you face in securing funding?

Who do you consider part of your resource mobilization network?

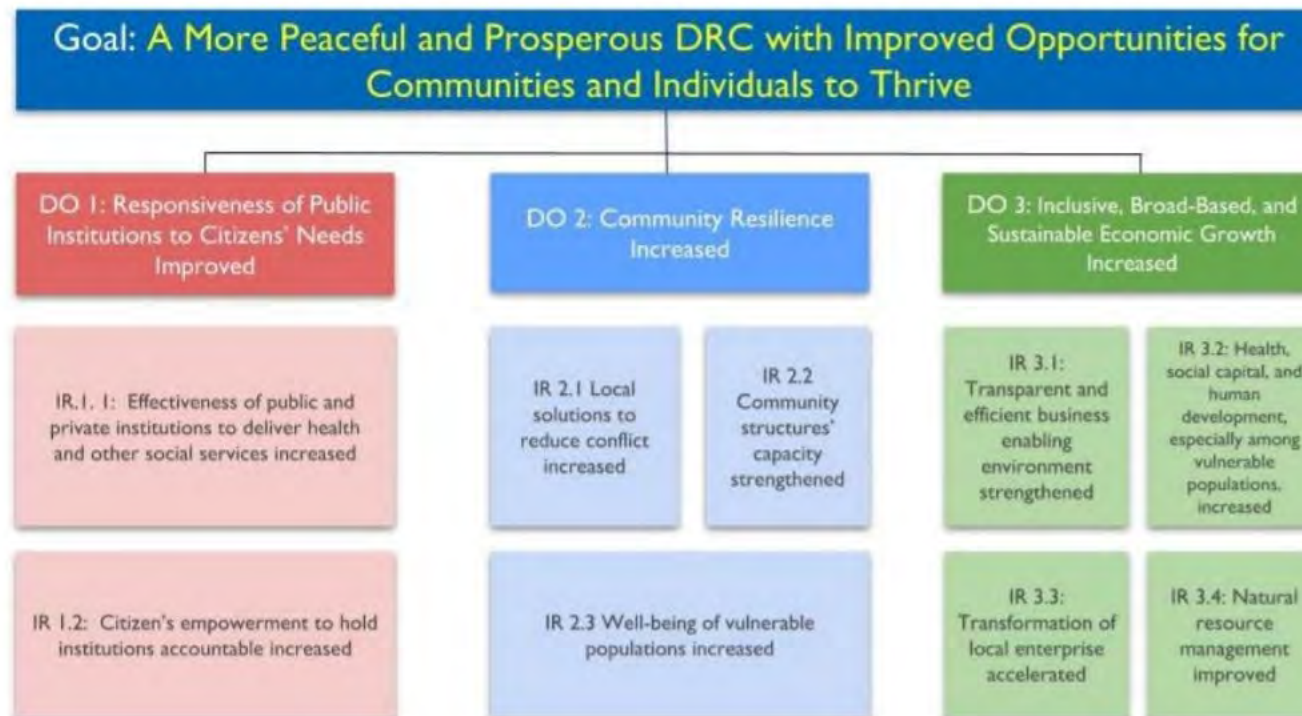What are your top 3 goals for developing this strategy?

Resource Mobilization Process
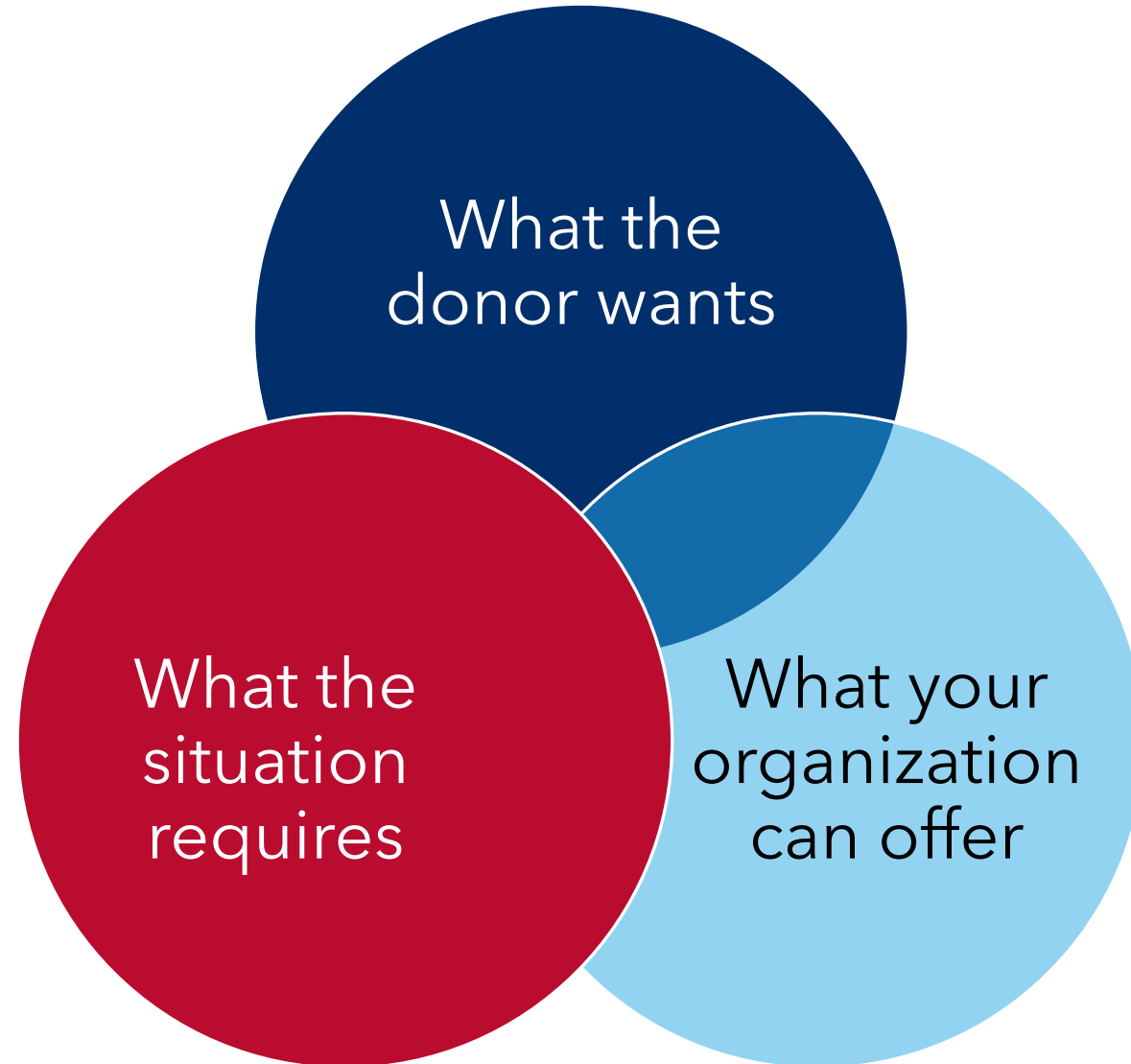
Donor Mapping: Get to know your funder

- 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

Goal: A More Peaceful and Prosperous DRC with Improved Opportunities for Communities and Individuals to Thrive

DO 1: Responsiveness of Public Institutions to Citizens' Needs Improved	DO 2: Community Resilience Increased		DO 3: Inclusive, Broad-Based, and Sustainable Economic Growth Increased	
IR.1. 1: Effectiveness of public and private institutions to deliver health and other social services increased	IR 2.1 Local solutions to reduce conflict increased	IR 2.2 Community structures' capacity strengthened	IR 3.1: Transparent and efficient business enabling environment strengthened	IR 3.2: Health, social capital, and human development, especially among vulnerable populations, increased
IR 1.2: Citizen's empowerment to hold institutions accountable increased	IR 2.3 Well-being of vulnerable populations increased		IR 3.3: Transformation of local enterprise accelerated	IR 3.4: Natural resource management improved

Source: https://www.usaid.gov/results-and-data/planning/country-strategies-cdcs

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

Resource Mobilization Strategy Template

| Objectives	Resources required	Potential Donors/ other sources of funding	Funding Gap	Actions required to raise the resources	Responsible Parties	Timeframe	Challenges
What are we trying to achieve?	*What do we need to accomplish our goal?*	*Where will the resources come from?*	*What or who do we need to know that we don't know now (info / access)?*	*What are the steps required to secure the resources?*	*Who will do what, specifically?*	*When will each step happen? When are the resources needed?*	*What internal or external factors will we need to consider?*

Part 1: Question Break

Part 2: Identifying Resources

What are resources?

Human	Physical	Social or Political	Financial	Natural Advantages
• Skills • Experience • Ideas	• Facilities • Equipment • Materials • Tools	• Partnerships • Good will • Reputation • Favorable policies	• Money • Unrestricted Funding • Access to credit • Revenue from business activity	• Location • Natural Resources • Fertile Land

Internal Resources

In a sustainable organization, **everyone** is responsible for resource mobilization
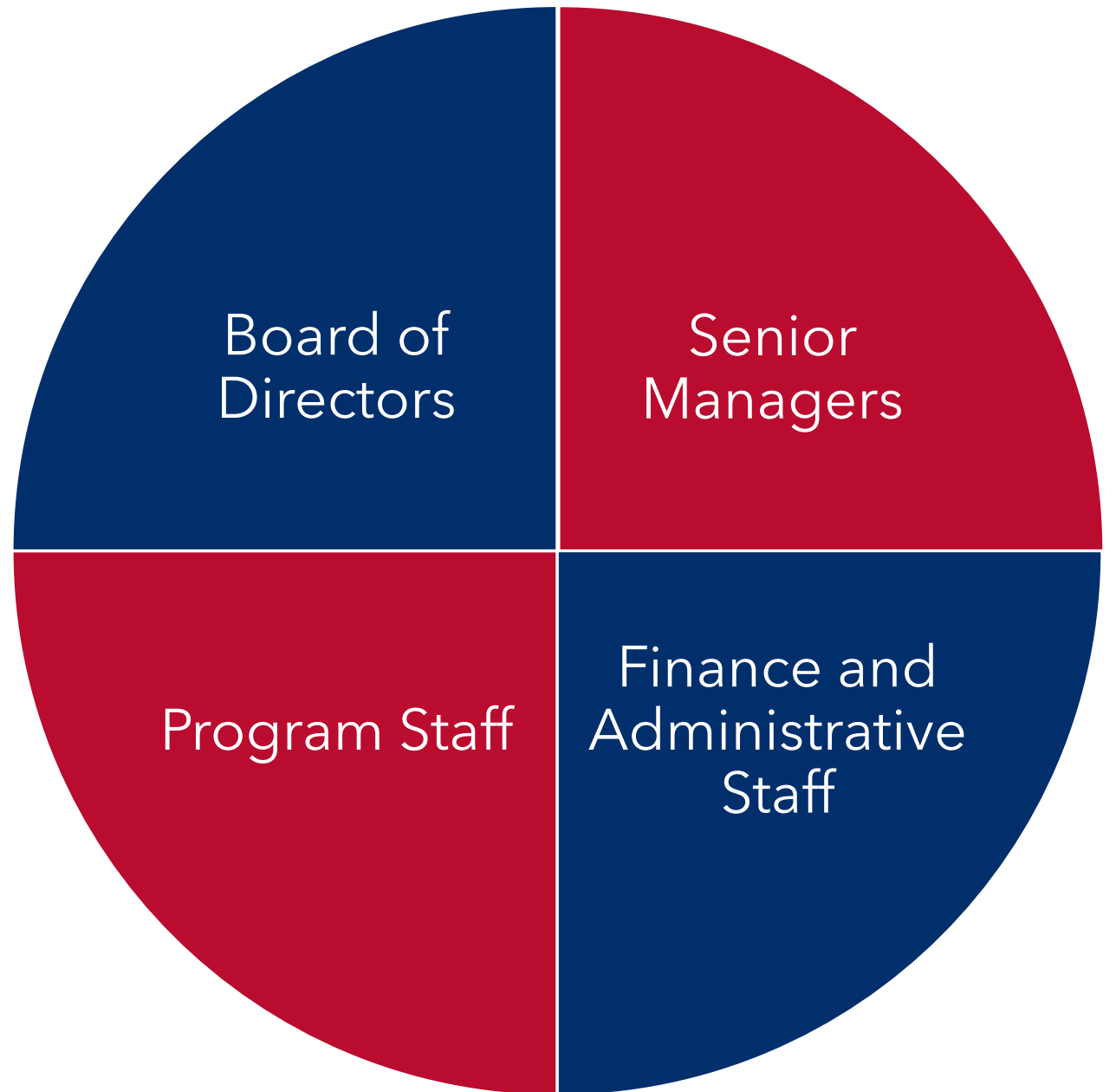
Roles and Responsibilities for RM

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**, a searchable database of USAID's most recent awards.
- Business Forecast: https://www.usaid.gov/business-forecast
  - *Quarterly forecast Q+As are a great opportunity to get feedback from USAID on upcoming procurements*
- Grants: Grants.gov
- Contracts: Sam.gov

Sources: 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

Malaria Case management and surveillance activity

A&A Plan ID: AA-314997
NAICS Code: TBD
Fiscal Year of Action: 2022
Last updated: 8/26/2021

Operating Unit: Tanzania
Sector: Global Health
A&A Specialist / POC: Linuma,Oddo
Award Length: 5 years
Eligibility Criteria: N/A
Principal Geographic Code:
935 - Worldwide (Including Cooperating Country)

Award/Action Type: Cooperative Agreement
Category Management Contract Vehicle: N/A
Solicitation Number: TBD
Small Business Set-Aside: N/A
Co-creation: TBD

Anticipated Solicitation Release Date:
1/14/2022

Anticipated Award Date:
7/15/2022

Total Estimated Cost/Amount Range:
$25M - $49.99M

Focus - Supporting implementation of Malaria case management, Malaria in Pregnancy and Surveillance activities.

Hide change log

Change Log

Date and Time	Updates
08/25/2021 11:22 PM EST	Changed Anticipated Award Date to 07/15/2022 from 06/13/2022
07/26/2021 12:55 PM EST	Changed Eligibility Criteria to N/A from TBD Changed Category Management Contract Vehicle to N/A from TBD Changed Anticipated Solicitation Release Date to 01/14/2022 from 12/15/2021 Changed Award/Action Type to Cooperative Agreement from To Be Determined (TBD)
07/14/2021 06:36 AM EST	Added Principal Geographic Code 935 - Worldwide (Including Cooperating Country) Removed Principal Geographic Code TBD
03/09/2021 03:16 AM EST	Added Co-creation TBD

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
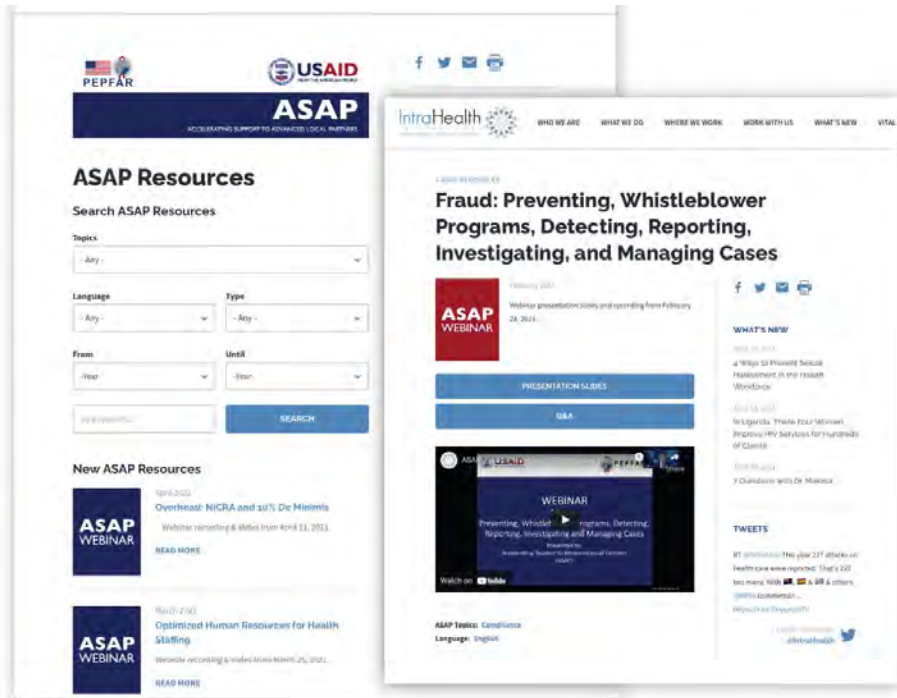
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