

# Resource Mobilization for Civil Society Organizations in a Digital Context

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Session #3

## Connecting to Make an Impact Keys to Success with Proposals

2025





## Resource Mobilization for CSOs in a Digital Context

Session #3: Connecting to Make an Impact: Keys to Success with Proposals

### 1. Introduction

This workshop, "Connecting to Make an Impact: Keys to Success with Proposals," is the natural continuation of our session on donor relationships, and together they form a comprehensive view of resource mobilization. While the first part focused on building trust, this session is dedicated to formalizing that trust in a strategic and persuasive document: the grant proposal. We address the challenge of ensuring that promising relationships translate into funding, and that technically sound proposals do not fail due to a lack of a compelling narrative. These two sessions are mutually reinforcing; success in one depends directly on the quality of the work done in the other.

The guiding principle is that a winning proposal is the union of a well-designed solution and strategic communication that resonates with the donor's priorities. By the end of this session, participants will be able to:

- **Build** the central argument of a proposal, persuasively connecting the problem, the solution, SMART objectives, and the sustainability strategy.
- **Formulate** the critical components of a proposal, including a compelling executive summary and measurable project objectives.
- **Evaluate** how a proposal's structure and narrative elements reinforce each other to convince a donor to invest in the project.

### Session 3 Script: Connecting to Impact - Donors

Minute	Slide number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
0-10	1-4	<b>Welcome and Objectives.</b> Project Slide 1. Briefly review (2 min) Session #2. Use Slides 3-4 to present today's objectives.	Recap of the previous session. Purpose and objectives of Session #3: Translate the relationship into a written proposal.	Framing + Thematic connection.	Connect explicitly: "In the previous session, we built the relationship. Today, we will learn how to formalize that trust into a winning proposal."
10-15	6-7	<b>Introduction to the Proposal.</b> Use Slide 7 to launch interactive questions in the chat: "What successes (or failures) have you had with proposals you've submitted?"	The bridge between the relationship and the written proposal. Validate the group's experiences.	Interactive dialogue.	Read a couple of responses from the chat aloud to create an atmosphere of shared learning and recognize common challenges.



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15-35	8-9	<b>Architecture: First Impressions.</b> Explain the Cover Letter and Executive Summary using Slide 8. Launch Activity #1: "The Executive Summary Challenge."	Components and criticality of the Cover Letter and Executive Summary.	Conceptual presentation + practical group activity.	Emphasize: "The Executive Summary determines whether the donor reads the rest of the proposal." The activity should be very dynamic and focused on conciseness.
35-55	10-13	<b>The Heart of the Proposal.</b> Use Slides 10-12 to explain the Problem, the Solution, and the SMART Objectives. Launch Activity #2: "From Problem to SMART Objective."	Problem Statement, Project Description (Solution), Goals, and SMART Objectives.	Conceptual presentation + Individual/pair activity.	Give a very clear example of a SMART objective before the activity. The debrief should focus on the structure and fulfillment of the 5 criteria.
55-70	14-15	<b>Execution and Feasibility.</b> Detail Methods, Evaluation, Sustainability, and Budget using Slides 14-15.	Methods and Strategy (the "how"). M&E Plan (outputs vs. outcomes). Sustainability (exit strategy). Justified budget.	Conceptual presentation.	Focus on the "what" each section should include, rather than the detailed "how," to maintain momentum. The idea is to give a complete overview.
70-80	16	<b>Strategic Positioning.</b> Emphasize alignment with the funder's priorities. The golden rule: "ADAPT, DON'T COPY AND PASTE."	Strategic alignment with the donor. Creating a memorable message. Adapting templates.	Exposure + Key recommendation.	Use an emphatic tone and repeat the phrase "ADAPT, DON'T COPY AND PASTE." This is one of the most common mistakes and one of the most critical points to convey.
80-90	17-19	<b>Conclusions and Closing.</b> Recap the key ideas in a very visual and quick way. Highlight the "Actionable Recommendations." Open for 2-3 urgent questions and thank everyone.	Summary of workflows. Actionable recommendations.	Recap + Call to action + Formal closing.	End on time. Encourage people to apply a key recommendation in the coming week to encourage immediate application of learning.



## Activity 1: "The Executive Summary Challenge: Hook Them in 30 Seconds"

- **Objective:**
  1. Practice the skill of condensing vital project information into a brief and compelling Executive Summary.
  2. Emphasize the importance of quickly capturing the interest of the funding entity.
- **Estimated time: 15-20 minutes**
- **Materials:**
  1. A brief case study of a fictional project (or participants use their own project).
  2. Shared document or chat for each group to write in.
- **Instructions for the facilitator:**
  1. Explanation (5 min): "The Executive Summary is your written 'elevator pitch.' Your task in groups will be to write the 2-3 MOST important sentences for the FIRST lines of an Executive Summary. Think about: the URGENT problem, your solution, and the key impact."
  2. Small group work (7-10 min): Divide into groups of 3-4. Each group writes their 2-3 impactful opening sentences.
  3. Sharing and Discussion (3-5 min): Each group posts their sentences in the chat. The facilitator reads some examples and asks the whole group: "Which sentences did you find most compelling and why?"

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## Activity 2: "From Problem to SMART Goal: Measuring Change"

- **Objective:**
  1. Directly connect an identified problem with the formulation of a SMART goal.
  2. Reinforce the importance of measurement and specificity in proposals.
- **Estimated time: 15-20 minutes**
- **Materials:**
  1. Virtual platform that allows screen sharing and chat.
- **Instructions for the facilitator:**
  1. Explanation and example (5 min): "Let's practice linking a problem to a SMART goal." The facilitator shows a clear example:
    - Problem: High post-harvest losses among smallholder farmers.
    - SMART goal: "Train 50 smallholder farmers in 'Los Pinos' in improved techniques to reduce their losses by 30% in 12 months, measured through pre- and post-surveys."
  2. Individual or Pair Work (7-10 min): "Now it's your turn. Think of a common problem in your area. Write down 1-2 SMART goals to address it, making sure they meet the 5 criteria."



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3. Sharing and Feedback (3-5 min): 2-3 volunteers share their problem and objective. The group provides feedback on whether it is specific, measurable, achievable, realistic, and time-bound.