



Mobilization resources for civil society organizations in a digital context

Session 1: Financing based on clear criteria for a strategic "yes"

2025





**Funding based on clear criteria for a
strategic "yes"**

Slide showing the sessions and where we are

Session #1

Design, implement, and refine a strategic screen to align organizational decisions with key objectives and priorities, ensuring that the tool is dynamic and adaptable.

1

2/3

Sessions 2 and 3

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

Session 4

Artificial intelligence for resource mobilization

4

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Session 5

Decoding communications:
How to create a plan that connects, motivates, and inspires

Session 6

Strategy in action:
Developing a resource mobilization plan

6

Session 1: Objectives

At the end of this session, participants will be able to

- ✓ Justify the implementation of a strategic screen by assessing its potential impact on the organization's effectiveness and direction.
- ✓ Select and justify 5 to 7 essential decision criteria, distinguishing between those that are indispensable and those that are desirable in the organizational context.
- ✓ Assess the strategic importance of weighting criteria as a reflection of the organization's priorities and direction.
- ✓ Design a first draft of the strategic screen, combining the selected criteria and their weighting in a functional scoring tool.
- ✓ Formulate an action plan to test, validate, and refine the strategic screen, ensuring its evolution as a "living tool."

What are we going to see today?



The challenge

The challenges facing
NGOs



The strategic screen

Earning more by doing less



Defining criteria

Brainstorming

What are we going to see today?



Assign weightings

Strategic prioritization



Objective rating

All that glitters is not gold



Putting it into practice

Design and examples



What organizational obstacles do you encounter when seeking new funding opportunities?



Many complications when mobilizing resources?



**Pursuit of every
opportunity?**



**Lack of time/staff for
strategic analysis?**



**Are proposals being
rushed?**

The solution: the strategy screen

- A simple, objective framework facilitates decision-making.
- Aligning efforts with the mission saves time and energy.
- Clear and objective criteria help focus resources.



Key benefit: earn more by doing less

- Focus on high-potential opportunities.
- Make informed, strategic decisions.
- **Don't get involved in something you can't afford to lose.**

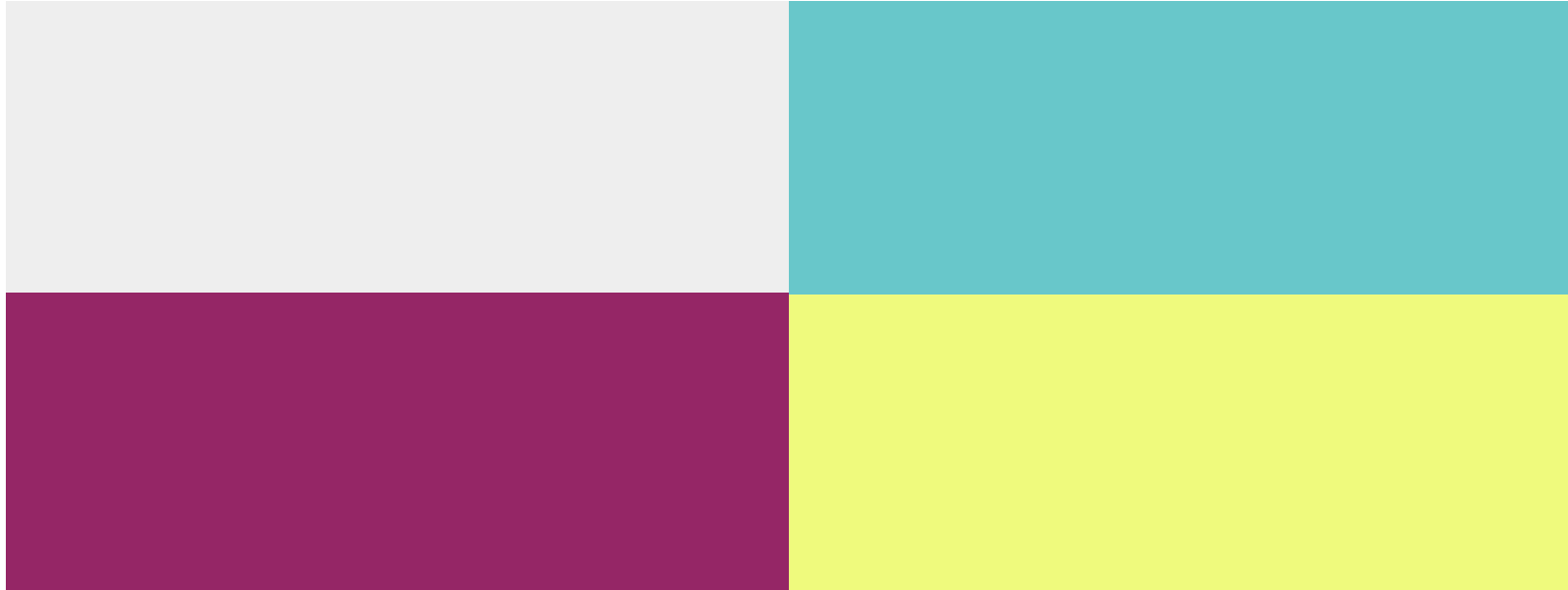




What is most important? Define your criteria

- Brainstorming: what is crucial for YOUR organization?
- Select 5 to 7 key criteria.
- Examples: alignment with mission, budget size, donor history, likelihood of winning.
- Start by thinking carefully about who should help you define the criteria.

Group exercise: brainstorming and prioritizing criteria



Assign weights: not all criteria are equal

- Distribute 100% among the criteria you have chosen.
- Reflect your organization's priorities.
- Example: alignment with mission (25%), budget adequacy (25%), likelihood of success (25%), strategic alliances (10%), donor reputation (10%), future potential (5%).



The final product: strategy screen in action



CRITÈRES	POIDS (%)	SCORE POSSIBLE (Points Max)	SCORE DE L'OPPORTUNITÉ (Points Attribués)	COMMENTAIRES
Alignement avec les Priorités Stratégiques Mondiales	25%	5		C'est une priorité absolue pour l'impact global de notre organisation. (25% de 20 = 5 points max)
Forte Chance de Gagner (Basée sur l'expérience passée et l'adéquation)	25%	5		Nous devons être réalistes quant à nos chances compte tenu de la concurrence et de notre capacité. (25% de 20 = 5 points max)
Montant du Budget Suffisant pour Couvrir les Coûts et Offrir une Qualité	25%	5		Nous devons nous assurer que le financement permet une mise en œuvre efficace et ne crée pas de contrainte financière. (25% de 20 = 5 points max)
Opportunité de Partenariats Locaux Significatifs	10%	2		La collaboration renforce notre travail et promeut l'appropriation locale. (10% de 20 = 2 points max)
Bailleur de Fonds avec une Histoire et une Réputation Positives	10%	2		Travailler avec des bailleurs de fonds fiables et éthiques est crucial pour une expérience positive. (10% de 20 = 2 points max)
Potentiel de Financement Futur ou d'Expansion	5%	1		Bien que ce ne soit pas la priorité la plus élevée, les opportunités de croissance sont précieuses. (5% de 20 = 1 point max)
TOTAL	100%	20		Le score total de l'opportunité sera la somme des points attribués pour chaque critère.



Group exercise: weighting your criteria and drafting a screen design



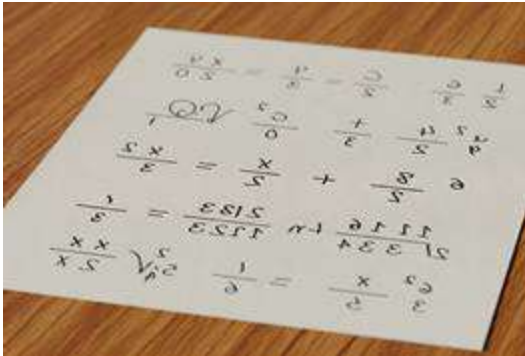


Group exercise: weighting your criteria and drafting a screen design



1. Compatibility with the **mission 10%**
2. The opportunity that this funding will bring us **30%**
3. The donor's political orientation **20%**
4. The real impact of the funding on the target population **30%**
5. The quality of the administrative procedures involved in submitting our **funding application 10%**

Evaluate opportunities: objective assessment



**Use a simple scale (e.g.,
20 points in total).**



**Calculate based on
weightings.**



**Evaluate them using a
structured and clear
approach.**

Put it into practice: test, monitor, adjust

Winning tips

- "Prototype mindset": start simple, test v old bids.
- Use it consistently (15 to 20 minutes per opportunity).
- Track decisions and results.
- Ask for feedback (whether you win or lo
- A living tool. It must be tested, adapted, improved.



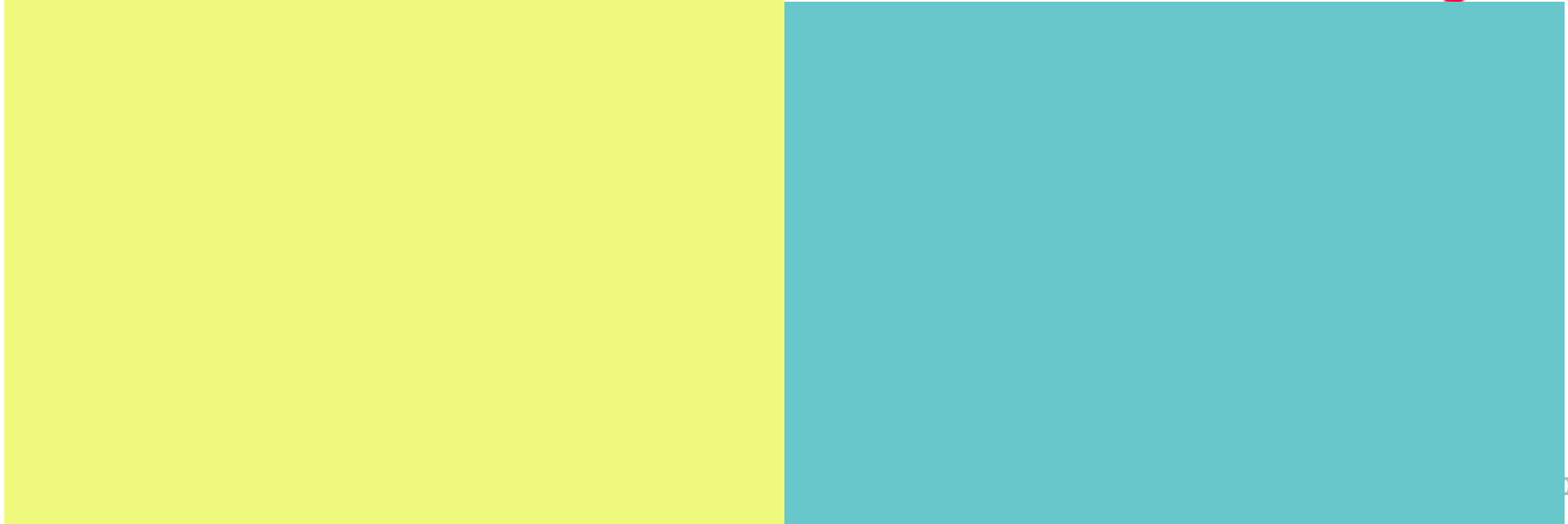


**Quickly evaluate
a request for
proposal/RFP
using your
strategic screen**





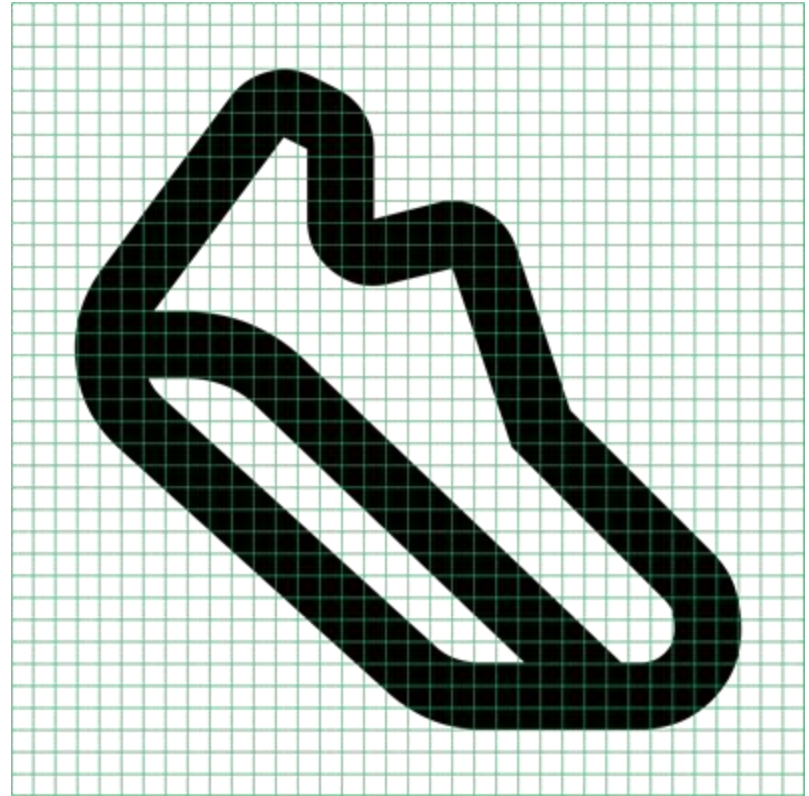
Quickly evaluate a bid using your strategic screen



What now? Next steps

1. Form a small team within your organization to refine your screen design.
2. Test it retroactively.
3. Start using it!

Questions and answers



Thank you!



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